Business Section

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FOREIGN TRADE

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Right Hon. C. D. Howe
Minister of Trade and Commerce

M. W. Mackenzie
Deputy Minister

FOREIGN TRADE

OTTAWA, JULY 17, 1948

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In This Issue

Canada—Films Portray Life and Production in Sixty Countries.. 106
Argentina—Exchange Controls Reach Peak During May..... 109
Haiti—General Prosperity Not Expected to Continue..... 113
United States—Lumber Exports from West Coast Increased.. 118
El Salvador—Economic Conditions Favourable Last Year..... 120
Canada—ECA Procurement Authorizations 18 Per Cent of Total 123
Canada—Many Countries Apply Provisions of Geneva Pact.. 125
Dominican Republic—Sugar and Cocoa Feature Record Trade. 126
Map—Central America and the West Indies..... 130
China—Industry Becoming More Centralized in Coastal Areas.. 132
Canada—Monthly Summary of Foreign Trade..... 134
United States—G. R. Paterson Elected Chairman of I.E.F.C..... 138

Regular Features

Foreign Exchange Quotations..... 156
Foreign Trade Service Abroad..... 153
Foreign Trade Inquiries..... 138
Trade and Tariff Regulations..... 139
Trade Commissioners on Tour..... 141
Transportation..... 142
Departures from Montreal..... 142
Departures from Quebec..... 147
Departures from Halifax..... 148
Departures from Saint John..... 148
Departures from Vancouver-New Westminster..... 149

COVER SUBJECT—Canadian certified seed potatoes being unloaded in the port of Victoria, Brazil. The *S.S. Brazilian Prince*, which carried this initial consignment, is now loading at St. Lawrence ports for Rio de Janeiro, Santos, Montevideo and Buenos Aires, her cargo consisting of agricultural implements, aluminum, asbestos, newsprint, wood pulp and a variety of other commodities. Exports to Uruguay during the five months ended last May were valued at $1,415,000, compared with $1,228,000 in the corresponding period of 1947. Shipments to Argentina declined in this period from $14,988,000 to $8,667,000, and to Brazil from $10,027,000 to $8,955,000. Total exports to Latin American countries in the first five months of this year were valued at $48,274,000, which compares with $55,055,000 in 1947 and with only $7,729,000 in the corresponding period of 1938.

Films Portray Canadian Life and Production in Sixty Countries

Audience for moving pictures of this country estimated at 70,000,000 — Industrial films stimulate sales and instruct buyers in method of operating equipment—Trade Commissioners provided with projectors to assist in demonstrations —Distribution of travel pictures aids tourist industry.

FILMS about Canada, her industries and her people, are shown annually in some sixty countries to an estimated international audience of more than 70,000,000 people, all potential purchasers of Canadian goods and services. These films tend to create a better understanding of this country, its resources, industries, marketing methods, its vast strength and its friendly attitude towards other peoples.

Of particular interest to Canadian manufacturers, however, is the increasing use abroad of industrial films to introduce and promote the sale of their products. Demonstration films convey to foreign buyers and consumers a clear picture of a company's commodities and their specific advantages over competing lines. In this connection, more and more firms are taking advantage of the specialized services offered by the National Film Board and the 45 trade commissioners in 37 countries.

It is evident that commercial films designed for foreign markets are destined to play an increasing role in the future. British industry realizes their selling value, and appreciates that a good motion picture can provide buyers with a tour of a plant and leave a lasting impression. A recently published list of Canadian industrial films indicates that Canadian manufacturers are also aware of their value. The use of films as a sales media at the recent Canadian International Trade Fair, in Toronto, is still further evidence of the trend.

In certain countries, where import restrictions limit or prohibit the purchase of Canadian goods, films offer an inexpensive method of institutional advertising, and keep consumers Canada conscious. Under present conditions of travel difficulties, shortages of exchange, etc., films assist in originating and maintaining sales contacts. A recent example was the case of an English dress manufacturing firm, which immediately placed an order after officials had seen the Canadian film, "Fashions by Canada".

Trade Commissioners Equipped with Projectors

Canadian Trade Commissioners have at their disposal 16 mm. projection equipment and up-to-date film libraries, which help them in their efforts to create interest in Canada as a supplier and buyer of goods and services of all kinds. These modern aids to promotional work supplement the wealth of data on trade and other subjects with which trade commissioners are supplied, such as samples, catalogues, price lists, etc., provided by individual firms seeking outlets for their goods or sources of supply abroad.

The National Film Board, through its distribution section, has placed a steady and ever-increasing flow of films on the international circuit.

The value of films abroad was recognized some time ago by the Department of Trade and Commerce. As a result, such films as "Bluebloods from Canada", "Certified for Seed", etc., were produced specifically for use abroad to promote the sale of Canada's livestock, certified seed potatoes, and other products.

The National Film Board's "Certified for Seed" has had an encouraging response. It did much in Italy, for example, to interest Italians in Canadian methods of seed certification. In Argentina, Uruguay and other Latin American countries, as well as the United States, it has stimulated sales.

Manufacturers in many other countries have been impressed by the fact that Canada is the fourth largest industrial power among the allied nations. This information was graphically illustrated in the film "Canada World Trader", which also shows how and what manufactured goods can be produced in this country.

Again, Britons were told where they were obtaining most of their bacon through the film "Bacon for Britain". Prior to its extensive showing, they were largely unaware of the fact that Canada was their main source of supply. The British Ministry of Food as well as a number of retail and wholesale groups held screenings of the picture, which told the story of how Canada was co-operating in supplying food to Britain.

Tourist Industry Assisted

Canada's tourist industry is being stimulated abroad, a number of films sponsored by the Canadian National Railways and the Canadian Government Travel Bureau being shown in the United States and other countries. They depict the beauties of Canada, from fishing in the Maritimes to mountain-climbing in the Rockies.

The latest production, "Bluebloods from Canada", is devoted to livestock, and is being distributed to many countries around the globe. The film indicates the high calibre of Canadian breeds and is designed to increase foreign interest in purchasing Canadian breeding stock.

Another film planned by the Department is "Stuff for Stuff", which is being distributed in the interests of bettering world trade. As such, it is documentary, but should do much from a prestige point of view.

Some time ago, aided by the Canadian Manufacturers' Association, Canadian firms were requested to loan suitable industrial films for distribution to appropriate offices of the Trade Commissioner Service. In many cases, sound tracks were available in Spanish, Portuguese and French, in addition to English. Prints were distributed to offices in the various language areas. Trade Commissioners have reported a keen interest in these specialized films, dealing with specific industries or processes.

The United Kingdom furnishes a good example of the extent to which Canadian films are distributed. There are at least 29 major industrial firms that maintain film libraries, and are regular borrowers of Canadian films. Major distribution, however, is made through the Central Office of Information, which maintains ten regional offices and has 140 circuits, and which also distributes to 125 film societies. It has distributed 171 National Film Board subjects and its average monthly circulation of Canadian films is approximately 1,200 screenings. Total yearly audience is estimated at about 5,000,000.

From October, 1947, to January 15, 1948, 134 bookings were made in the United States for four Canadian Government Travel Bureau films by the National Film Board. This amounted to approximately one showing a day. The estimated attendance at each showing is a minimum of 300. Therefore, in three months, a total of 40,000 people have viewed these films.

Latin America Interested in Canadian Films

There has been increasing interest in Canadian films in Latin America. Distribution non-theatrically in this area consisted of 2,500 screenings to an audience of about 500,000 for the last nine months of 1947. These figures comprise screenings and audiences in Argentina, Brazil, Colombia, Cuba,

15017—1½

Mexico and Peru, from which countries detailed reports were obtained. Reports from other countries do not enumerate specific screenings. An overall figure of screenings in Latin America for the year, allowing for countries for which detailed reports were not received, could be conservatively estimated at 4,000, and the audience at 700,000.

About 30 films in Spanish and Portuguese have been distributed theatrically in Latin America through Clasa Films Mundiales, in Mexico, and Peliculas Mexicanas and its subsidiaries, in Central and South America. Countries in which Peliculas Mexicanas distributes are Argentina, Brazil, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, El Salvador, Guatemala, Honduras, Panama, Paraguay, Puerto Rico, Uruguay, and Venezuela. Since the spring of 1946, it is estimated that the audience amounted to approximately 9,000,000.

There are 1,076 films on deposit with the various diplomatic missions and trade commissioner offices in Europe. While overall audience and screening reports are not available, the Information Attaché in France reported that over a three-year period the audience totalled some 900,000. In Norway and Belgium, a monthly circulation of 9,270 and 3,078 respectively is reported.

Distribution of Canadian films through the National Film Board office in Australia for the 12-month period ended February 29, 1948, totalled 21,500 screenings, with an audience of 594,342. During the same period, audiences totalling some 500,000 were reached in South Africa. In 1947, between 90,000 and 100,000 people attended screenings of Canadian films in the Belgian Congo.

Audience reaction to the various films is favourably recorded in the many letters received by the National Film Board from all points of the globe. Canadian firms are receiving audience reaction to their specialized films in the form of increased foreign business, product inquiries and requests for agency representation. Instead of the old English rule that "trade follows the flag", it is now "trade follows the film".

Firms having suitable films available on a loan or gift basis for distribution abroad should write the Publicity Division, Foreign Trade Service, Department of Trade and Commerce, Ottawa, giving details as to subject, colour or black and white, length, sound track, etc.

Very Limited Demand for Fox Furs at London Auction

London, June 7, 1948.—(FTS)—The Hudson's Bay Company's collection for the May, 1948, Auction Sale consisted of 25,706 Silver Fox, 2,922 Platina Fox and 1,774 Pearl Platina Fox skins of Canadian, American and Scandinavian origin. In view of the continued lack of interest in this article at the present time, the poor attendance of buyers and resultant very limited demand was not surprising, and the offering was mainly withdrawn.

Interest centred on the quarter-silvery, half-silvery and three-quarter silvery types of fox, thus confirming once again a tendency that has persisted throughout the season.

The quality of the Platina and Pearl Platina offerings was well up to standard.

Correction:

Caption on page 58 of the July 10, 1948, issue of *Foreign Trade* should read $1·2 billion instead of $1,200 billion.

Exchange Controls for Argentina Reach Peak in Month of May

On May 14, even outstanding exchange and import permits were subjected to review—No apprehension occasioned by steady increase in prices, wages, circulation and other monetary activities—Internal position gives no immediate cause for dissatisfaction, unless present trends continue.

By H. L. Brown, Commercial Secretary, Canadian Embassy

BUENOS AIRES, June 11, 1948.—Exchange controls in Argentina reached a peak on May 14, when even outstanding exchange and import permits were subjected to review. However, no apprehension has been occasioned in this country by the steady increase in prices, wages, circulation and all other activities measurable in terms of pesos. There is some restlessness, of course, as a result of the rising costs of living and the consequent continuing demand for higher incomes. The internal financial position gives no immediate cause for dissatisfaction but, if present trends continue, there will be an increasing need for some restrictive action by the authorities.

Wholesale prices in Buenos Aires, on the basis of 1926 as 100, have risen sharply to the point where the average for the first quarter of 1948 was 259·5 as compared with 244·0 for the same quarter of 1947. Retail prices in large establishments in Buenos Aires (1939 equals 100) had reached 293·8 in March, 1948, with a first-quarter average of 280·1, in contrast to 221·2 in the same three months of 1947. Inflation has become increasingly noticeable in Argentina during the past eighteen months and the curve has steepened in marked degree since the latter part of 1947. The government is now permitting substantial increases in some controlled necessities such as milk, formerly 30 centavos a litre, now 45, and gasoline which recently increased from 35 centavos to 60 per litre. The increase on gasoline, because of the effect on transportation, must affect the cost of many articles and services.

Government Income from Taxation Increased

On March 3 the General Tax Division of the Argentine Ministry of Finance made public a statement regarding government income from various sources during 1947 with comparative figures for 1946. The salient feature of the statement is the substantial increase of aggregate income from taxation. The 1947 total of 2,403,926,650 pesos exceeded that of 1946 by 916,167,284 pesos, or no less than 61·6 per cent. These figures should not be confused with the statistics covering general government revenue which totalled 3,233·4 million pesos in 1947 as against 2,053·1 million pesos in 1946; general revenue, of course, included such items as customs receipts and port dues which in 1947 totalled 588·2 million pesos.

Of tax collections proper, income tax accounted for 934·5 million pesos, or 38·87 per cent of all tax returns. This compares with 459·2 million pesos, or 31·94 per cent, in 1946. Thus income tax returns increased by no less than 96·6 per cent but this increase, in proportion to the increase of revenue from all taxation, showed a rise of only the difference between 31·94 per cent and 38·87 per cent. The excess profits tax yielded 194·8 million pesos, or 8·11 per cent, of the whole in 1947 as contrasted with 83·6 million pesos, or 5·62 per cent of the whole in 1946, and thus shows an

increase of 133 per cent over 1946. The new tax on incidental capital gains brought in 143·9 million pesos in 1947 as against 19·6 million in 1946 but, owing to the newness of the tax, these two figures are not comparable.

Tax Collecting Indicative of Prosperous Conditions

These and the other increases indicate that commercial and economic conditions in Argentina during 1947 enjoyed expansion and prosperity. The fact that the government, through taxation, has withdrawn 916·1 million pesos or nearly 1 billion pesos additional from circulation by private enterprise and the fact that the total withdrawn is nearly 2½ billion pesos is not without interest to anyone endeavouring to measure inflation or inflationary tendencies in Argentina. However, withdrawal is offset in some degree at least by the substantial increase in government expenditure. In this connection, it is interesting to note that aggregate tax collection in previous years amounted to 727·4 million pesos in 1942, 816·6 million in 1943, 1,128·1 million in 1944, 1,203·5 million in 1945 and, as already noted, 1,487·8 million pesos in 1946. The report emphasizes that 1947 witnessed "an extraordinary expansion in the financial-economic activities of the country as evidenced in a substantial augmentation of public acquisitive power which has had, as a corollary, a high level of general prosperity". It is not unexpected that the report should cite, as causal factors of this substantial increased revenue, the government's policy of economic reform, increased industrial development and expansion of foreign trade. Finally the tax office reports that the cost of collection was equivalent to 1·1 per cent of the aggregate collected.

Just before the elections in March, the Argentine Minister of Finance made a statement to the press regarding the financial and economic condition of the country. He pointed out that on only seven previous occasions in the past thirty years had the government shown a surplus at the end of a financial year and, on each of these occasions, the average surplus revenue was barely 20 million pesos while in 1947 it was 500 million pesos. The original budget estimate of revenue from customs and port dues was 440 million pesos while actual collections totalled 580 million, an increase of 30 per cent. Income tax showed an actual increase of 96·6 per cent and excess profits tax an increase of 133 per cent. This under-estimate of income had presumably been corrected, partly at least, in the 1948 estimates (submitted to Congress in July, 1947) as evidenced by the fact that the revenue estimate for 1948 totals 3,092 million pesos as compared with the original estimate of 2,523·8 million for 1947. Whether the current financial year will produce less or more than estimated must naturally depend on many economic factors, both national and international. The revenue outlook for 1948 must be directly related to revenue from import trade and commercial and industrial turnover. The former may quite possibly decline appreciably owing to restriction of imports resulting from exchange control; the latter may substantially be maintained at the 1947 level except in so far as the turnover depends on importations.

National Income Has Steadily Expanded

The Minister mentioned that the national income of Argentina had steadily expanded from 12,720 million pesos in 1943 to 17,000 million pesos in 1946. While he mentioned no estimate for 1947, he indicated that the rising tendency had continued. He estimated that the aggregate value of Argentine industrial production in 1947 yielded a figure in the neighbourhood of 16,000 million pesos, as compared with only 6,000 million in 1943.

Argentina—Diagonal Roque Saenz Pena, in Buenos Aires, one of the principal streets in this capital city.

There has been an increase of industrial production, but the increase of aggregate wages and salary paid in industry over the period under discussion was no less than 121 per cent, while the index of man-hours worked in industry denoted an increase of only 7 per cent.

The Minister gave the total of the Argentine national debt as 11,712 million pesos at December 31, 1947, and the balance of funded debt as totalling 8,999 million pesos. These two figures compare with 10,830 million and 7,950 million respectively in 1946. It is noteworthy that the increase of 882 million pesos during the year compares with the 1946 increase of 1,671 million in the total debt and is actually the lowest increase recorded since that of 1944. The budget surplus should possibly be given credit for the slackening of national debt increase.

National Mortgage Bank Shows Profit for Past Year

The Government-owned Banco Hipotecario Nacional recently issued its annual report for 1947. The year showed a profit of 4,499,191 pesos from gross income of 72,852,116 pesos. This profit is 1,915,455 pesos less than in 1946, a decrease partly accounted for by staff salaries, etc., which increased from 14,439,318 pesos in 1946 to 19,949,448 pesos in 1947. The capital of this bank stands at 100 million pesos. Loans during the year amounted to 438 million on 16,674 transactions, an increase over 1946 of 220 per cent in pesos and 189 per cent in loans. The bank owes the Central Bank nearly 1,640 million pesos. Banknote circulation amounted to 5,690·2 million pesos at May 15, 1948, as compared with 4,064·7 million pesos at the end of 1946.

Canada—Union Government of Burma Trade Delegation, broadcasting from the Canadian International Trade Fair to Rangoon. Left to right: E. C. Thorne, Commodity Specialist in machinery and industrial equipment, Foreign Trade Service, Ottawa; Kyaw Myint, Member of Burmese Parliament; Mr. Mya, Chairman of the Union Bank of Burma and Vice-President of the National Planning Board; Mrs. Kyi and Mr. Kyi, secretary of the delegation and an officer of the National Planning Board.

Photo by Gilbert A. Milne.

General Prosperity of Haiti Not Expected to Continue This Year

Difficulty in marketing current banana crop causing general slump—New textile mill should increase self-sufficiency in cottons—Canadian firms not extending suitable credit terms — Value of foreign trade highest in history in 1946-47 — United States control over customs ended with repayment of last installment of loan.

By R. G. C. Smith,* Commercial Secretary, Canadian Legation

(Values in United States dollars)

(See map on pages 130-131)

*(Mr. R. G. C. Smith is presently on tour in Canada, prior to his departure on posting to Rome.)

HAVANA, May 5, 1948.—Haiti's foreign trade was at the highest level in history during the fiscal year ending September 30, 1947. Exports of bananas, sisal fibre, and sugar rose both in volume and in value, while the rising price of export coffee increased revenue from this source. The increase in imports was even greater than in exports, a reflection of the general prosperity of the country. Canadians could share more largely in this market by adopting more suitable credit terms.

United States control over Haitian customs was ended by the repayment of the last installment of a loan from the United States, interest on which was the first charge against customs revenue.

Coffee, bananas, and sisal fibre are the three principal exports. Sugar ranks fourth and is an important source of income.

Coffee Export Values Higher

Coffee is a peasant crop. It is not grown on large plantations and much of the bean comes from wild plants. Its production, therefore, is not subject to wide variations. It is estimated, however, that the prolonged drought will have reduced the crop this year to about 24,250 short tons, from a normal production of about 26,450 tons. The actual tonnage shipped, amounting to 27,200 tons in the fiscal year 1947, was almost exactly the same as for the previous year, comparing favourably with about 26,000 for the prewar average.

Prices during the early part of the fiscal year 1947 were very good, and the bulk of the crop was sold by that time. However, the market broke sharply in April, and has not recovered its 1947 high levels. The current situation is not good. Although prices are slightly above the low points reached after April last year, there is still a large percentage of the small bean unsold. Unwashed coffee, which makes up about 92 per cent of total shipments, currently brings from $22 to $26 per 50 kilos f.o.b. Port au Prince. There has been a good demand in New York for the large bean from Haiti, but the lower grades are moving out slowly. Much of this is normally marketed in Europe, and the trade is bedevilled by the exchange problem.

Exports of coffee from October, 1947, to January, 1948, normally the most active shipping months, were only 7,825 tons, as against 12,450 tons for the same period last year. In value, exports were $3,491,000, compared with $5,585,000 for the same period last year. It is estimated that about 30 per cent of the crop was big bean coffee. Some small bean

15017—2

Haiti—Coffee berries. Prolonged drought is expected to reduce the crop this year to about 24,250 short tons, as compared with normal production of about 26,450 tons.

has been sold straight or in mixtures, so that it is probable that not more than 35 per cent remains unsold. The marketing problems and lack of demand for the remaining grades indicate a substantial carryover into next year.

Banana Trade Facing Difficulties

Exports of bananas in 1947 were most satisfactory, not only in price but in volume. Shipments in the fiscal year 1947 numbered 7,302,000 stems, as against 5,859,000 the previous year, and 2,054,000 for the prewar period. However, this year the trade is in a difficult position as there are no buyers for the bulk of the peasant crop. Apart from the large operations of the Standard Fruit Company, the banana production in Haiti is on a small peasant holding basis. In former years, the Standard Fruit Company operated under contract, by which they bought about two-thirds of their requirements from these small-scale farmers. This contract was terminated last year, so that purchases by the company are confined to its own production. The small farmer, therefore, has met with considerable difficulty in marketing his crop, and much of the fruit has been left on the tree.

The figures for October to January show that exports were 1,726,000 stems, valued at $1,425,000, compared with 2,497,000 stems, valued at $1,960,000, for the same period last year. It is considered that this downward trend will be accentuated as the year develops, and already the lack of "banana" money is having a most depressing effect on general conditions.

Outlook for Sisal Continues Favourable

This relative newcomer to the Haitian export picture continues to grow in importance. The increased value of the fibre in 1947 was not

matched by a corresponding increase in volume. The 23,300 tons shipped in 1947 was a 26 per cent gain over the previous year, while the value almost doubled. The demand for the fibre continues strong for the machine-prepared grades. For the period October-January, exports were 8,225 tons, valued at $2,297,000, compared to 6,500 tons, valued at $1,294,000 last year.

Sisal is principally grown in large developments, both private and semi-government, but there is also a considerable production of hand-retted or hand-combed fibre from plants bordering the fields of small peasant holdings. The demand for this type of fibre has fallen off and whereas the large-scale industry is in an excellent position, the loss of revenue to the small farmers from this "peasant" fibre is of some consequence.

Sugar Production Cut by Drought

Exports of sugar for the fiscal year 1947 were considerably higher in volume than in 1946. Total shipments reached 28,800 short tons, about 26 per cent above the previous year, but considerably below the prewar average of 34,700 tons. Nevertheless, higher prices obtained for sugar put its value well above both last year's and the prewar values. No figures are available for this year's estimate of production, but there is no doubt that it will be below that of 1947. A prolonged drought will reduce production appreciably. It is usual to cut cane on a seven-year cycle in Haiti, leaving two fields out of seven to be carried forward. This year the cycle will have to be broken, so that there will be no carryover of cane.

However, Haiti will receive a good price for the sugar it can export, as Great Britain has signed a contract at 5 cents per pound, f.o.b. Haitian ports, for all sugar up to 30,000 long tons, Haiti will probably not meet this maximum, but with the higher prices, the value should not shrink a proportionate amount.

A new mill is being constructed on the south coast near Aux Cayes, to come into production next February. With a total eventual capacity of 20,000 short tons and costs of production below those of Cuba, this development should prove of considerable significance to Haiti.

Principal Exports from Haiti

Fiscal years ending September 30

Commodity	1937-41 average	1945-46	1946-47
	(Thousands of dollars)		
Coffee	3,304	7,630	12,131
Bananas	704	4,023	6,150
Sisal fibre	698	2,948	5,671
Sugar and molasses	902	2,048	3,161
Cocoa	139	248	773
Handicrafts (articles of sisal, straw, and mahogany ware)	....	1,694	892
Essential oils	....	500	540
Totals	7,048	22,823	31,498

Imports Increase at Greater Rate Than Exports

The import trade in 1947 was exceptionally good. Following a succession of good years, when most commodities were in short supply, Haitian importers have cashed in this year on accumulated purchasing power. Consequently, imports increased at a higher rate than exports and, for five months of the year, were actually higher than exports. Nevertheless, the year closed with a substantial balance of trade in favour of exports. The following table shows the comparison of imports with exports for the last two fiscal years and for the prewar period:

15017—2½

Balance of Trade of Haiti

	1937-41 average	1945-46	1946-47
	(Thousands of dollars)		
Exports	35,241	22,823	31,498
Imports	40,362	15,921	27,230
Balance of trade	— 5,121	+ 6,902	+ 4,268

While Haiti was faced with the problem of maintaining a favourable balance of trade before the war, the total excess of exports over imports from the beginning of the fiscal year 1942 to the end of the 1947 fiscal year reached the considerable figure of $16,100,000.

Prospects for 1948 Not Encouraging

The adverse factors described under the various commodity headings above seem certain to prevent 1948 from being a good year for Haiti. Total exports for the period October to January have fallen off heavily compared to last year, while imports have continued to climb. The consequent disequilibrium is seen in the following table:

Balance of Trade of Haiti

	October to January	
	1946-47	1947-48
	(Thousands of dollars)	
Exports	10,508	9,646
Imports	6,301	11,185
Balance of trade	+ 4,204	— 1,539

It is unlikely that this adverse trend will continue. The pace of imports has shown a decided slackening in the last few months, largely because the lack of "banana" money is making itself felt throughout the country. The textile trade in particular is feeling this condition acutely and importers are showing considerable reluctance in placing new orders.

New Cotton Mill Opened

The recent opening of a cotton textile mill, to produce denims and grey goods from domestic raw cotton, will be of considerable significance to the future of the country. Denims and grey goods are the main clothing staples of Haiti, and eventually the new mill, modern in every respect, will be able to provide the Republic's total requirements of these lines and should have a surplus to export. Imports of cotton textiles were valued at $7,315,000 in 1947, or about 26 per cent of all imports. While not all of these textiles were denims or grey goods, they made up a heavy proportion of the total. As well, there has always been a big importation of second-hand cotton bags to be used for clothing; it is probable that the new mill will effectively stop the majority of these imports.

This development, together with the construction of the new sugar mill, will, therefore, have considerable importance in maintaining a balance in Haiti's future trade. Haiti has always looked to Europe rather than to the United States for a market for its coffee and sugar. At the same time, it has had to depend almost entirely on the United States for the bulk of its purchases. If it can become less dependent on the United States for its large requirements of cotton, and at the same time step up its sugar production, for which it should be able to secure dollars, there should be no serious balance of payments problems in the foreseeable future.

Market Limited by Low Purchasing Power

The Haitian market is one of extremely low per capita purchasing power. There is little demand for quality merchandise, and the only factor that counts is price. Thus any products entering the market must be of the cheapest possible grades, packed in the smallest practical units.

The immediate outlook is not particularly encouraging, but the fact that the country is not as prosperous basically as a year ago has increased the market for fish products. Codfish, bloaters and pickled alewives are a staple article of diet, and hard times force the peasant to put his little available money into low-cost food. Thus he turns to fish, where under better conditions he might eat more meat or costlier products. In addition, a prolonged drought has cut down the amount of food that the peasant produces himself. Much depends on a solution to the marketing of the banana crop. If this trade can be restored, there will be an almost immediate beneficial effect on the economy.

Opening for Canadian Products

With the limitations just mentioned, there is an opening in Haiti for many Canadian products. The Saguenay Terminals, Montreal, are operating a direct steamship connection to Port-au-Prince from Canadian Atlantic ports, and there is an interest in trading with Canada.

In many cases, Canada is forfeiting its hope of developing trade in a market that, however small, has no exchange problems whatsoever. The failure to do business on a cash-against-documents basis is a severe handicap, as frequently the volume of business, particularly at the start, does not warrant the extra expense involved in a letter-of-credit transaction. As well, United States firms are freely offering terms of cash against documents or better. There are many well known and thoroughly responsible houses in Haiti, and the failure of Canada to adopt credit terms that are suited to actual conditions is a very serious handicap to the development of Canadian trade.

New Zealand Invites Tenders for Electrical Equipment

The New Zealand State Hydro-Electric Department, Wellington, New Zealand invites tenders for the following:

11 KV Switchgear for Hayward's Substation; Contract No. 93, Section 281, Palmerston North.

The tenders close with the Secretary, Tenders Committee State Hydro-Electric Department, Wellington, New Zealand, on October 5, 1948. Interested Canadian firms may obtain further particulars and specifications from J. A. Malcolm, New Zealand Government Trade Commissioner, Sun Life Bldg., Montreal.

Trade Fair in Vienna Planned

Canadian manufacturers and producers are invited to participate in a trade fair that is scheduled to take place in Vienna from September 5 to 12, 1948. The Austrian market is principally interested in machine tools, machinery for wood-working, food processing and packing, in textiles, plastics, printing, electrical equipment, passenger automobiles, trucks and accessories.

Requests for information concerning this fair should be addressed to Mr. Sanford De Brun, Austrian Foreign Trade Office, 25 Broad Street, New York 4, U.S.A.

Lumber Exports on West Coast of United States Greatly Increased

Shipments from North Pacific Coast aggregated nearly 750 million board feet, more than double the 1946 volume—Great Britain was largest purchaser—Lumber prices continue to rise—Production of lumber increased—Petroleum industry unable to keep pace with expanding demand.

By V. E. Duclos, Canadian Government Trade Commissioner

(Editor's Note—This is the second in a series of three articles on economic conditions on the West Coast of the United States for 1947, prepared for *Foreign Trade*. The first article appeared in the July 10th issue.)

LOS ANGELES, April 19, 1948.—Construction lumber was in heavy demand in the Twelfth District* during 1947, not only for domestic use, but also for export. Water-borne export shipments from the North Pacific coast (Oregon and Washington ports) aggregated nearly 750 million board feet in 1947, more than double the 1946 volume and equivalent to the best month's total output of the Douglas fir area in any year since 1944, according to a recent report of the Federal Reserve Bank of San Francisco. Heaviest foreign shipments were made in the second and third quarters of the year. Over half the total lumber exports from this area in 1947 was to Great Britain, with substantial quantities going also to China, Africa, South America and Australia, and lesser quantities to the Netherlands, Belgium and France. The total water-borne movement, foreign and domestic, from the North Pacific ports was over 1·5 billion board feet, up 90 per cent from 1946, reflecting in part the greater availability of ocean shipping and generally easier freight rates.

With the rise of material prices and building labour costs to record levels, lumber prices have experienced a spectacular increase. The composite lumber price index, as computed by the Bureau of Labor Statistics, has more than trebled. Over the 13 months from October, 1946, to November, 1947, the lumber index advanced 54 per cent, much the greater part of the increase occurring in the four months between October and February. There was some slowing down in March and April, followed by a slight recession in May and June, but in the last half of the year lumber prices resumed their upward course.

Prices of Southern Pine Declined

Prices of western lumber of standard grades and dimensions appear to have been affected very slightly by the temporary decline in the market last spring. It was chiefly the weakness in southern pine, which declined about 10 per cent between February and June, that caused the recession in the composite lumber price index in May and June. Standard grades of Douglas fir held at firm prices through the year. Minor reductions occurred in some grades of Ponderosa pine in June, followed by speedy recovery. White pine maintained a steady advance throughout. Prices of sub-standard grades and of rough unfinished lumber weakened somewhat in April and May, reflecting primarily the improved supply of finished lumber. The small mills generally appear to have made in 1947, as in 1946, a very substantial contribution to the total lumber supply, although their logging and milling practices have in many cases been uneconomic.

* The Twelfth District of the Federal Reserve Banking System comprises the Western States of Arizona, California, Idaho, Oregon, Nevada, Utah and Washington.

Production conditions were much easier in 1947 in most of the logging and lumbering areas of the West Coast than in 1946, and a considerably greater output of finished lumber was obtained. Industrial relations improved and labour supply increased substantially; more logging and mill equipment became available; weather conditions were exceptionally favourable through most of the year. Shipping difficulties were not so acute as in 1946, when maritime strikes occurred. Freight car shortages, however, were still a limiting factor on production in many instances, especially in the summer months when box cars were diverted to move the bumper wheat crop of the Southwest.

Lumber Production Increased Over That for Previous Year

Total estimated lumber production, based on trade association reports, was about 14·6 billion board feet in 1947, an increase of roughly one-sixth over reported production for 1946. This output was slightly above the average of the three years 1942-44; production in the last half of 1947, in fact, exceeded that of the corresponding period of any year since 1941. Actual lumber output in the past two years has been substantially greater than the above estimates because of a large unreported production by small sawmills whose output is extremely difficult to estimate. The most recent census count of lumber production in the twelve western states indicates that previously published estimates for 1946 output should be increased by about 12 per cent. Possibly some such ratio may also apply to the 1947 estimates, although there are some indications of a considerable mortality rate among the small mills in 1947.

The major part of the increased lumber output in 1947, compared with 1946, occurred in the Douglas fir area, where reported production rose from 6·5 to 7·6 billion board feet. In combination, the Western pine and redwood areas produced nearly a billion more board feet in 1947 than in 1946. Increased output was particularly striking, proportionately, in the Redwood area, where some of the largest mills had been strikebound for a substantial part of 1946. Marked expansion also occurred in 1947 in pulp and paper production, in the operations of plywood and millwork plants, and in furniture and other wood-working establishments.

Production of Petroleum Products Unable to Meet Requirements

In 1947 the rapidly increasing demand for petroleum products exceeded supplies in many parts of the country. Many of the industry's problems, however, resulted from shortages of transportation facilities of one kind or another, rather than from inadequate production, although efforts to increase output were hampered in many cases by lack of equipment and manpower. As compared with the situation in many parts of the country, particularly towards the end of the year, conditions were relatively favourable in the Twelfth District and a much better balance was achieved between supply and demand than in the country as a whole.

Shortages of fuel oil threatened to develop at various points, largely as a consequence of reduced output of hydro-electric energy caused by low stream flow and the necessity to supplement water power by steam-generated current. This extra demand on steam plant facilities came at a time of rapidly mounting power requirements and of limited supplies of natural gas, the alternative fuel. The use of fuel oil by the electric power utilities of the Pacific Coast States averaged about 4·5 million barrels per year during the years 1942 to 1945. It rose to nearly 11 million barrels in 1946 and almost 17 million barrels in 1947. The rapid growth of heating requirements incident to increased population and building activity was an important factor in the fuel oil situation in 1947. The demand for diesel oil for rail and motor transportation also established a

new high level, as more and more diesel-type locomotives and trucks were put into use. With more cars and trucks in operation than ever before, the demands of motorists and other users of gasoline attained levels in 1947 well above previous records. Gasoline output was for several months near the rate of the top months of 1945, when the war effort was at its peak. Offshore demand for petroleum products also increased substantially.

Petroleum Industry Steadily Increased Output Last Year

Faced with this combination of demands for its major products, the petroleum industry steadily stepped up its output in 1947. Average daily output of crude oil in 1947 exceeded 912,000 barrels, as compared with 894,000 in 1945, the previous high year. Production of refined oils was within about one per cent of the 1945 record. Drilling, both exploratory and development, was exceedingly active in many areas, and was limited only by the availability of equipment. About 1,600 new wells were completed in California in 1947, as compared with 1,375 in 1946 and 1,690 in 1945.

Prices of crude oil and of all major petroleum products were sharply advanced during 1947. The largest increase came at the end of the year, when crude oil prices were raised 50 cents per barrel and gasoline prices 1·8 cents per gallon, with corresponding advances for other products. The succession of increases in 1947 brought the price of crude oil to its highest level in more than twenty years.

Plans were announced during the year by one of the leading petroleum producers for the early construction of a 200-mile pipe-line to bring crude oil from the Rangeley oil field district in Northwestern Colorado to a new refinery to be built in the Salt Lake City area. It is expected that this operation will, in time, serve a considerable part of the Intermountain and Northwestern markets and thus relieve the pressure on California oil resources, which promise to be completely absorbed at an early date by the growth of local population and industry. The 1,200-mile natural gas pipe-line from West Texas to Southern California was opened in November.

Economic Conditions in El Salvador Favourable During the Past Year

Largely attributed to continuing high price and yield of coffee—Production of sisal, cotton, seed oil, cane sugar and cereals, such as beans, maize and rice, also contributed—Foreign trade, totalling $75,977,200, established a record.

(See map on pages 130-131)

By C. B. Birkett, Canadian Government Trade Commissioner, Guatemala City

EL SALVADOR prospered during the past year, despite currency and import restrictions imposed by many other Latin American countries. Although this condition is largely attributed to the continuing high price and yield of coffee, the production of sisal, cotton, seed oil, cane sugar and cereals, such as beans, maize and rice, has contributed to the favourable economic situation. El Salvador also produces staple foods, such as dairy products, meats, vegetables and fruits.

Coffee makes up 80 per cent of the country's exports. The season is from November to October and exports in that period during 1946 and 1947 amounted to 845,000 bags (150 pounds each). The estimate of the current crop is 900,000 bags. Most of it is already sold at high prices with the

best washed grade bringing $30 per 100 pounds. The estimated value of the annual exportable surplus is $35,000,000.

The production of coffee in El Salvador is on a highly scientific basis, with close attention given to final curing and grading. The quality has been standardized into four grades in such a manner that American roasters buy coffee in advance of the crop in the knowledge that the exact quality they need for their blends will be forthcoming.

Price of Sugar Greatly Decreased

Annual production of sugar is in the neighbourhood of 60,000,000 pounds, of which 30,000,000 pounds are consumed locally. At the beginning of 1947, the price paid for "plantation white" grade was $10 per 100 pounds. By the end of the year, this had dropped to $4.50. Difficulty is being experienced in disposing of last year's crop, there being approximately 10,000,000 pounds yet to be sold. Exports are mainly to the surrounding Central American republics.

The co-operative society of cotton growers in El Salvador has achieved much toward efficient control of marketing and the rehabilitation of the industry in general. Modern ginning plants have been installed, with the result that the cotton produced today is of a quality acceptable in world markets. Annual production is around 8,000,000 pounds of ginned cotton, of which 5,000,000 pounds are consumed by the local mills. All exportable surplus up to the end of 1948 has been disposed of. Estimated value of exportable surplus in 1947 was $900,000. In addition, local mills export rough cotton fabrics to Honduras and other Central American republics.

A good level of production is maintained in cotton seeds, sesame seed, peanuts, black beans, rice, balsam and honey. There are usually sufficient surpluses for export to Central and South American countries.

Gold production decreased during 1947, owing to a rich vein running out. Exports amounted to $407,389 worth as against $762,034.

Organized industries exist to absorb a good proportion of the sisal, cotton, and seed production. All requirements of coffee bags are manufactured from henequin (sisal hemp). Annual production is about 1,800,000 bags, of which 1,400,000 are used locally by the coffee industry, while the remainder are sold to neighbouring republics.

Six textile mills working 24 hours per day turn out rough piece-goods and drills. Two modern seed crushing and oil refining plants produce high quality oils for cooking and industrial purposes. Two foundries fabricate kitchen boilers and stoves, as well as steel curtains—all formerly imported. Other industries turn out straw mattings, clay products, tiles, footwear, leather goods in general, including baggage. Also tailoring and the manufacture of men's underclothing are national industries.

Established a Record Last Year

El Salvador's trade with the world during 1947 reached the record total of $75,977,200. It was an abnormal year for imports, the value increasing by over 80 per cent over that for the previous year to a total of $35,918,400. Exports were also higher, totalling $40,058,800, leaving a favourable balance of $4,140,400.

As with other importing countries, El Salvador received goods during 1947, orders for a good part of which were placed two and three years ago. As a result, temporary embarrassment was caused to many merchants. But the consequences were not serious, as most houses were prepared for this influx of goods and there were no major bankruptcies. Sufficient luxury goods were imported to cover all requirements. The market has been filled to saturation point with motor cars, radios, electrical appliances, haberdashery, fancy-goods, etc.

15017—3

It is of interest to note that, despite the abnormally high imports in 1947, the balance of trade remained favourable.

Complete statistics of El Salvador's trade in 1947 have not yet been published. An indication of its direction, however, is given by the figures for 1946.

Direction of Foreign Trade

	Imports	Exports
	Percentage	
Europe	7.5	4.5
Americas	92.2	95.5
Asia	.1	.01
All others	.09	....

In 1946 the value of exports was $26,151,800, while imports totalled $21,136,098, indicating a favourable balance of $5,015,702.

According to the Dominion Bureau of Statistics, Canadian exports to El Salvador in 1947 were valued at $665,332, while the value of imports from that source was $1,341,873, leaving a balance in favour of El Salvador of $676,541.

Purchases from Canada comprised mainly newsprint, flour, artificial silk, mineral wax, whisky, machinery, aluminum products, drugs and chemicals, leather, men's hats, belting and canned fish.

Canadian Purchases from El Salvador*

Coffee	(4,522,948 pounds)	$1,336,975
Cotton linters	(42,508 pounds)	3,418
Furniture of wood		824
Honey	(3,276 pounds)	543
Drugs and barks		113
Total		$1,341,873

* Dominion Bureau of Statistics figures.

El Salvador has not been without her share of labour unrest. Attempts have been made, however, by the government, and with some success, to improve the conditions of the working classes. Wages and salaries in general have been increased. As the result of more industrial activity of a secondary nature than in the other Central American republics, the problem of maintaining a reasonable standard of living for the masses is not such a complex one and is more easily solved.

Business Conditions Generally Quiet

Business conditions generally have been quiet, due mainly to the excessive imports in 1947, which have placed a good section of the merchants in an over-bought condition. To aggravate this situation there has been a rise in price of maize, beans, and rice during the past twelve months due to illicit exports of these cereals and damage to crops by locusts. The rise in prices is reported to be 100 per cent. In effect it has caused a diversion of surplus purchasing power from manufactured goods to high-priced essential foodstuffs. A corrective would be a high yield of this year's cereal crops. A stop has already been put to the export of these commodities.

DIRECTORY INFORMATION

The Foreign Trade Service head office directory, as well as the directory of Foreign Commercial Representatives in Canada appars in the last issue of *Foreign Trade* each month.

Canada Contributes Eighteen Per Cent to European Requirements

Procurement authorizations, amounting to $762,747,140 for first quarter, issued by Economic Co-operation Administration, in Washington, of which purchases valued at approximately $142,000,000 being made in this country—Seventy-four per cent of purchases being handled through regular trade channels.

PROCUREMENT authorizations amounting to $762,747,140 have been issued by the Economic Co-operation Administration, in Washington, for the first three months in which the European Recovery Program has been functioning. Canada has been requested to furnish approximately eighteen per cent of the products concerned, of which $123,050,000 are for the United Kingdom, $2,098,000 for the Netherlands, $2,005,591 for Austria, $1,450,000 for France, $1,000,000 for Italy, $570,000 for Norway, $198,400 for Denmark and $130,000 for Greece. Upwards of $11,000,000 is classed under the heading of general authorizations, Canada and the United States being shown as the sources of supply. As indicated in the June 19th issue of *Foreign Trade*, Canada has contracted to furnish commodities valued at $264,783,407 for the first year of the ERP program, though payment for these with ECA funds has not yet been authorized.

Participating countries have been invited to draw up a list of their requirements on a three-month basis, and also an overall list of requirements for the United States fiscal year ending in June, 1949. The countries have been requested to show their total import requirements in these lists, the source from which they prefer to secure the commodities concerned, and whether they wish to arrange payment with ECA dollars or with their own earnings. These national programs are screened in Paris by the countries themselves. An effort is made at this stage to ensure that the total value of requirements is kept within the limits of funds appropriated for authorization by ECA, and to ensure that imports are not sought from the Western Hemisphere, if the commodities concerned can be made available in any of the participating countries. The consolidated import requirements of the participating countries are then forwarded to Washington and reviewed by ECA officials before approval is granted in whole or in part. These import programs are in general terms, and the requirements are listed under fifty-three headings.

Wheat and Flour Head List of Requirements

Wheat and flour head the list of commodities authorized to July 5 for procurement in this country, followed in succession by bacon, aluminum, copper, wood pulp, zinc, lead, linseed oil, lumber, cheese, hides, coarse grains, beef, nickel, fish meal (feeds), ammonium nitrate, oilcake and meal (linseed meal), asbestos and rubber, as listed below. In addition, ECA has authorized the procurement of horsemeat valued at $6,360,000 for shipment by Canada and the United States to Germany, and brass strips valued at $348,000 for shipment to Austria.

Authorizations for Procurement in Canada

Wheat and wheat flour	$66,118,000
Bacon	27,900,000
Aluminum	11,500,000
Copper	6,760,000
Wood pulp	5,500,000

15017—3½

Authorizations for Procurement in Canada—*Concluded*

Zinc	3,800,000
Lead	3,300,000
Linseed oil	1,327,190
Lumber	1,000,000
Cheese	700,000
Hides	601,400
Coarse grains	570,000
Carcass beef	550,000
Nickel	177,000
Fish meal (feeds)	151,900
Ammonium nitrate	130,000
Oilcake and meal (linseed meal)	112,500
Asbestos	100,000
Rubber	41,000

Seventy-four Per Cent Through Trade Channels

Of the total procurement authorizations issued to July 3 by ECA, commodities valued at $566,098,288 were for purchase by participating countries or their agents, or by importers, through regular trade channels. Procurement agencies for the remainder were: United States Department of Agriculture, $131,506,448; Department of the Army, $61,062,471; Department of the Navy, $1,681,907; and Bureau of Federal Supply, $2,398,026. Seventy-four per cent of the purchases authorized will be supplied through trade channels.

Procurement authorizations, including ocean and inland freight, since the inception of the Economic Co-operation Administration total $732,151,728 for European countries, as listed below, $26,575,000 for China and $4,020,412 for Trieste.

Procurement Authorizations, by Countries

United Kingdom	$226,066,200
France	206,199,672
Italy	106,563,052
Bizone Germany	53,109,000
Netherlands	43,005,581
Austria	38,577,789
Greece	32,031,741
French Zone Germany	11,080,245
Denmark	9,740,200
Norway	5,778,248
Total Europe	$732,151,728

Procurement Authorizations, by Commodities

Wheat	$151,591,580
Wheat flour	46,624,722
Meats	42,838,357
Cheese	15,700,000
Other food products	33,028,429
Inedible oils and fats	12,017,855
Feeds	3,597,200
Seeds	468,000
Fertilizer	10,063,920
Coal	65,948,000
Petroleum products	105,706,957
Cotton	45,688,200
Other fibres and textiles	1,078,820
Tobacco	21,582,000
Medicines and chemicals	9,012,280
Non-metallic minerals	2,763,000
Non-ferrous metals	49,872,360
Iron and steel	11,495,297
Agricultural and industrial equipment	9,865,999
Lumber	8,161,000
Hides, skins and rubber	742,400
Ocean and inland freight	84,305,352
Total, Europe	$732,151,728

Procurement Authorizations by Commodities—*Concluded*

Trieste	
Wheat flour	$ 1,062,318
Other food products	1,324,930
Coal	561,000
Inedible oils, fats and medicines, etc.	114,765
Ocean freight	957,399
Total, Trieste	$ 4,020,412
China	
Wheat flour	1,106,960
Rice	11,620,040
Cotton	13,000,000
Ocean and inland freight	848,000
Total, China	$ 26,575,000
Total, all countries	$762,747,140

Eleven per cent of the expenditure authorized by the European Co-operation Administration during the first three months of its operations was for ocean and inland freight, the aggregate amount being $86,110,751. This is a further reason for the provision, where possible, of supplies for any country from within the group of participating countries, rather than from the Western Hemisphere or some other part of the world.

Twenty-Two Countries Apply Provisions of General Agreement on Tariffs and Trade

Most-favoured-treatment being extended to one another over 44,000 tariff concessions negotiated in Geneva—Chile only country that did not sign Protocol of Provisional Application by June 30.

By Commercial Relations and Foreign Tariffs Division, Foreign Trade Service

TWENTY-TWO countries have signed the Protocol of Provisional Application pertaining to the General Agreement on Tariffs and Trade, whereby they undertake to extend to one another most-favoured-treatment over 44,000 tariff concessions, negotiated at Geneva last year. Chile is the only country that did not sign the Protocol before June 30, which was the expiry date. It has requested an extension of the period, however, and this is now under consideration by the contracting parties.

The twenty-two signatories represent approximately 80 per cent of world trade, a fact that provides cause for satisfaction at a time when restrictions and controls create so many difficulties for businessmen who are anxious to exchange the goods of their respective countries.

Burma, Ceylon and Lebanon signed the Protocol on June 29, while Brazil, New Zealand, Pakistan and Syria signed on June 30. They will become contracting parties to the trade agreement on the expiration of thirty days from the date of their signature. The other fifteen countries are: Australia, Belgium, Luxembourg, the Netherlands, Canada, China, Cuba, Czechoslovakia, France, India, Norway, South Africa, Southern Rhodesia, the United Kingdom and the United States.

The fact that the agreement is being provisionally applied limits the immediate application by the contracting parties of only Part II of the agreement. This contains provisions concerning:

(*a*) National Treatment on Internal Taxation and Regulation.

(*b*) Freedom of Transit.

(*c*) Anti-dumping and Countervailing Duties.

(*d*) Valuation for Customs Purposes.

(*e*) Marks of Origin.

(*f*) Quantitative Restrictions.

(*g*) Subsidies.

(*h*) State Trading, etc.

During the provisional application of the agreement, contracting parties undertake to apply Part II only "to the fullest extent not inconsistent with existing domestic legislation".

The definitive entry into force of the agreement is closely related to the action which the fifty-three governments that signed the Final Act of the Havana Conference will take with respect to the Charter for an International Trade Organization.

Sugar and Cocoa Feature Record Trade of Dominican Republic

Value of shipments in 1947 five times prewar 1935-39 average value—Favourable balance of trade recorded—External debt liquidated—Central Bank established—Canada's trade position favourable, assisted by regular steamship services.

By R. G. C. Smith, Commercial Secretary, Canadian Legation

(All values are in United States dollars)

(See map on pages 130-131)

(Editor's Note.—Mr. Smith is at present on tour in Canada, prior to proceeding in September to Rome on posting.)

HAVANA, April 14, 1948.—Sugar and cocoa contributed substantially to the record foreign trade figures attained by the Dominican Republic during the past year. Other export items, such as tobacco, bananas, corn and coffee, showed reductions from 1946, but the overall importance of sugar more than offset these slight recessions. Economically, the year was featured by the retirement of the total foreign debt and the creation of a Central Bank.

The value of exports in 1947 showed a substantial increase over the 1946 figure and was about five times the prewar 1935-39 average value. It was also the highest ever recorded in the history of the republic. The following table shows comparative values of exports of main commodities for 1947, 1946 and the prewar period 1935-39, with percentages of total exports accounted for by individual items:

Comparative Values of Main Export Commodities

	Average 1935-39 $1,000	Per cent of total	1946 $1,000	Per cent of total	1947 $1,000	Per cent of total
Total exports	16,500	....	66,689	....	83,206	....
Sugar	9,864	60.0	35,374	52.0	51,297	62.0
Cocoa	2,031	14.0	4,451	6.7	12,952	15.6
Coffee	1,564	....	5,420	8.1	5,126	6.1
Tobacco	298	1.8	8,795	13.0	4,548	5.4
Molasses	704	4.3	2,581	3.9	2,962	3.5
Corn	252	1.5	1,456	2.2	1,136	1.4
Lumber	n.a.	....	841	....	710	....
Bananas	63	....	874	....	651	....
Starch (yucca)	n.a.	....	401	....	525	....
Fresh meat	n.a.	....	575	....	491	....
Rice	....	....	737	....	....	....

As indicated in the foregoing table, sugar is still the key to prosperity in the Dominican Republic. However, although the 1947 figures show that sugar has resumed its prewar dominant position among export commodities, there has been a satisfactory diversification in the development of cocoa, tobacco, corn, bananas, starch, meat, rice and lumber. This development is more readily apparent from comparative volumes of exports in the prewar and postwar periods, as indicated in the following table:

Comparative Volumes of Main Export Commodities

	Average 1938-39	1946	1947	1946-47 incr. over prewar av.
	Figures in short tons			Per cent
Total exports	....	776,000	800,000	....
Sugar	480,000	458,000	517,000	1.6
Cocoa	27,100	27,800	33,100	12
Coffee	12,600	15,850	12,500	12
Tobacco	6,830	31,300	16,500	250
Corn	14,300	25,100	20,100	58
Bananas	290	30,800	23,300	8,340
Starch	n.a.	2,430	2,120	....
Lumber	n.a.	14,200	11,490	....
Fresh meat	n.a.	1,580	....	....
Rice	....	4,220	1,230	....

It will be noted that, whereas the total value of exports increased by about 25 per cent, volume was only slightly ahead of last year's. This is, of course, partly accounted for by the considerable change in the proportional share of total exports of the various commodities, but it is also a reflection of the continued rise in the values of most staples.

Although the value of imports in 1947 was nearly double the 1946 figure, it was only slightly more than half the value of exports. The balance of payments figure is, therefore, most satisfactory, especially since the foreign debt has been retired.

Comparative Trade Balances

	Average 1935-39	1946	1947
	Figures in thousands of dollars		
Exports	16,394	64,792	83,206
Imports	10,869	27,888	*48,667
Balance	+ 5,525	+36,904	+34,539

*Subject to adjustment.

The high import value for 1947 was also a record but, if comparative figures for volumes of imports in 1946 and 1947 were available, there is no doubt that the increase would not be as pronounced as in the case of values. Nevertheless, the increase in imports in 1947 was most satisfactory and helped to fill much of the back-log of materials which the market required.

Although production of sugar in 1947 was not particularly high, the value of exports reached record levels. The average price for the crop, which was tied to the Cuban-United States contract, was $\$4.96\frac{1}{4}$ per hundred pounds. The export value worked out at $51,297,000, a figure never before attained by Dominican sugar.

As a result of a prolonged drought, the 1948 position is not encouraging, production being estimated at 470,000 short tons. However, the Republic will fare better than other producing countries in the matter of returns, the British Government having contracted to purchase the crop at five cents per pound. At this rate, and allowing some 30,000 tons for domestic consumption and free sale, the revenue from exports of sugar in 1948 will be over $43,000,000, which is an excellent return considering the relatively low production. Furthermore, the Republic should start 1949 without any

carryover, which will place it in an enviable position should the 1949 world supplies catch up with available demand.

The production of cocoa has been fairly steady, but in 1947 was probably somewhat above the 1946 figure, being estimated at 29,000 short tons. However, as a result of the greatly increased price in 1947, cocoa became the second most important export commodity. In November, the price f.o.b. Ciudad Trujillo was $35.50 per 50 kilograms as compared with $13.50 in the same month of 1946.

The outlook for 1948 is somewhat confused, owing to the imposition of an export tax that will materially reduce returns to producers. Current prices are about $30 per 50 kilos, but the farmer only receives from $19 to $20. Nevertheless, this is considered an excellent return as compared with that received even as recently as 1946. The drought will reduce production this year but, as long as current prices hold, total returns should be satisfactory.

Positions of Other Export Crops not as Favourable

Coffee—Exports in 1947 fell off both in volume and in total value, but, on account of the higher prices received during the year, the reduced value was of minor importance. Much of the 1947 production was shipped on consignment to New York, where, owing in part to the poor grading and classification of the coffee, demand fluctuated.

Coffee is mainly a peasant crop, and production does not vary greatly from year to year. In 1946-47, production (harvested September to March) was estimated at 21,700 short tons. The current crop is estimated at about 18,700 tons, an appreciable reduction. Domestic consumption accounts for about 6,200 tons and, as last year's stocks were all shipped out of the country, there will be about 12,500 tons available for export. The quality of this crop is reported to be excellent, so that, provided New York prices do not weaken, the outlook is fairly favourable.

Tobacco.—Tobacco exports in 1947 were adversely affected by the lack of foreign exchange in Europe. Further, the dry weather reduced production, both in quality and yield, to about half the bumper crop in 1946 (31,100 tons). However, the main problem was lack of markets, which left much of the crop in dealers' hands.

Plantings in 1948 are reported to be higher than last year, but the continued drought will have reduced the yield—perhaps not too serious a prospect in view of the lack of export markets.

Corn.—Chiefly as a result of good prices in Cuba and Puerto Rico, this crop has only recently become of any export importance. Two crops are harvested—in April-July and in December-January. The first of the 1947 crops was satisfactory, but drought reduced the second. Production in 1946 was estimated at 83,000 tons, and last year's output would probably be somewhat under this figure. Production in 1948 will also be affected by the prolonged drought, but no crop estimates are available.

Bananas.—The reduction in exports of bananas in 1947 may be regarded as a temporary setback, since the main development of the United Fruit Company in the Monte Cristy district, in the north, is not yet in full production.

Rice.—As a result of reduced rice production, caused by the long drought, it was necessary to import supplies for the first time since 1940. In 1947, a total of 4,550 tons was imported from Ecuador to supplement the irrigated rice crop, estimated at between 25,000 and 30,000 tons. In addition to the irrigated crop harvested in the autumn, dry rice crops are harvested in December to February and in July and August, with a normal total yield of about 15,000 tons. The continued drought will probably make it necessary to import more rice in 1948.

The loss of the dry rice crops has an adverse effect on the general purchasing power of the population, since rice is the staple article of diet. Retail prices during 1947 were as high as 25 cents per pound, but since then they have dropped appreciably. This is a comparatively new crop for the Dominican Republic; prior to 1930 the bulk of domestic requirements was imported.

In July, 1947, the external debt of the Republic was completely paid off. The debt, amounting to approximately $9,400,000, was liquidated by a cash payment of $1,200,000 out of current revenue and by the sale of $8,200,000 of bonds of the Reserve Bank, to be redeemed out of 1948 revenues. It is doubtful if the 1948 revenue will be sufficiently high to permit of making such a payment, but any outstanding amount will be an internal and not an external debt.

In July the Central Bank began operations, and provision has been made for the gradual withdrawal of United States currency in circulation, to be replaced by the Dominican peso with a par value equal to the United States dollar. Some $17,000,000 of Dominican currency has so far been issued. Although there has undoubtedly been some hoarding of United States dollars, conversion has been accomplished without upsetting the commerce of the country.

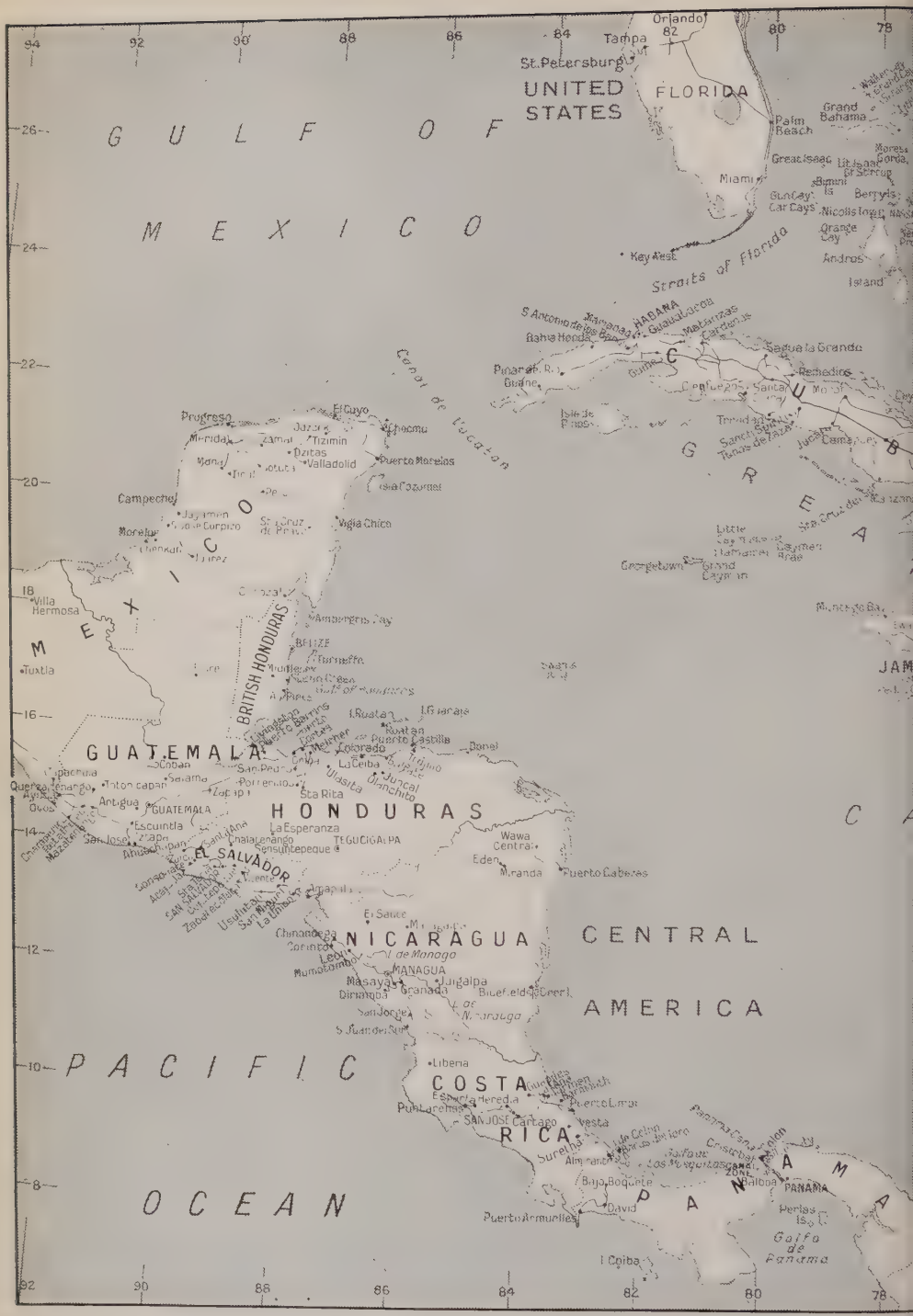
No figures of budget revenue and expenditure are available, but they are both at a high level. The extensive public works program has continued at a high level, although some of the projects were temporarily suspended.

Although production is still at a high level generally, and world prices continue satisfactory, the Dominican Republic market is at present very quiet. Importers, in general, are not making large purchases. The reason for this is obscure, since conditions are economically sound. Possibly the failure of world prices to show any tendency to fall and the generally unstable world conditions are mainly responsible for slowing up the import market. In addition, recently imposed new and heavy taxes have had a most depressing effect on the market and have further increased the cost of living.

Canada's Trade Position is Favourable

The desirability of increasing trade with Canada is strongly supported, and a good opportunity is afforded Canadian manufacturers to obtain a much larger share of the market. Saguenay Terminals Limited operates a regular freight service from Canadian Atlantic ports to Ciudad Trujillo, which has assisted greatly in developing Canadian trade with the Republic. However, there are many opportunities that are still unsecured. There are no exchange problems in dealing with importers in the Dominican Republic; payment can be made freely in United States dollars. There is a market for the majority of food products and for nearly every type of manufactured article with the exception of most heavy machinery, ready-made clothing, cheap shoes, wooden furniture and lumber. For many items the volume may be relatively small, but anything that can be offered in free competition with United States products can find some outlet in this market.

However, the insistence by many firms on letter-of-credit terms is imposing a heavy and almost entirely unnecessary brake on Canadian trade with the Dominican Republic. Such credit restrictions, which are no longer being demanded by most United States firms, may very well eliminate any possibility of sales. In the first place, it adds to the cost of the shipment, particularly when extensions are requested, and, secondly, many merchants resent the implied reflection on their honesty. There are a great many old and thoroughly responsible importing houses in the Dominican Republic, and the risk of doing a cash-against-documents business with such firms is almost negligible, provided, of course, the merchandise is delivered in accordance with the terms of the contract.


GULF OF MEXICO
UNITED STATES
FLORIDA
Tampa
St. Petersburg
Orlando
Miami
Palm Beach
Key West
Straits of Florida
HABANA
Matanzas
Cardenas
Cienfuegos
Santa Clara
Sagua la Grande
Remedios
Caibarien
Nuevitas
Camaguey
Holguin
Bayamo
Manzanillo
Santiago de Cuba
Guantanamo
Baracoa
Pinar del Rio
Isle de Pines
Canal de Yucatan
Progreso
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Valladolid
Puerto Morelos
Isla Cozumel
El Cuyo
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Villa Hermosa
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Chetumal Bay
Amapengos Bay
Gulf of Honduras
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Jamaica
Montego Bay
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Negril Point
Little Cayman
Grand Cayman
Georgetown
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La Esperanza
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El Sauce
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Puerto Limon
San Jose
Cartago
Vesta
Turrialba
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Almirante
Bocas del Toro
Bahia Honda
Bajo Boquete
David
Puerto Armuelles
Isla Coiba
Golfo de Panama
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Panama Canal
Canal Zone
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Perlas Is.
Cristobal
Portobelo
Nombre de Dios
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Virgin Gorda
Jost Van Dyke
Saba
St. Eustatius
St. Kitts
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Rio Paraguay
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Rio Bermejo
Rio Salado
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Rio Chubut
Rio Deseado
Rio Santa Cruz
Rio Gallegos
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Courtesy, Canadian Geographical Society.

Chinese Industry Becoming More Centralized in Coastal Areas

Main centres at Shanghai and Tientsin—Present disturbances creating ever greater concentration—Conditions relatively stable in southern provinces—Industrialization in Hong Kong shows marked increase.

By L. M. Cosgrave, Commercial Counsellor for Canada

(Editor's Note.—This is the third in a series of six articles on economic conditions in China, prepared by Mr. Cosgrave for *Foreign Trade*, and is the first general review of that country presented since 1940. The first two articles appeared in the July 3 and July 10 issues.)

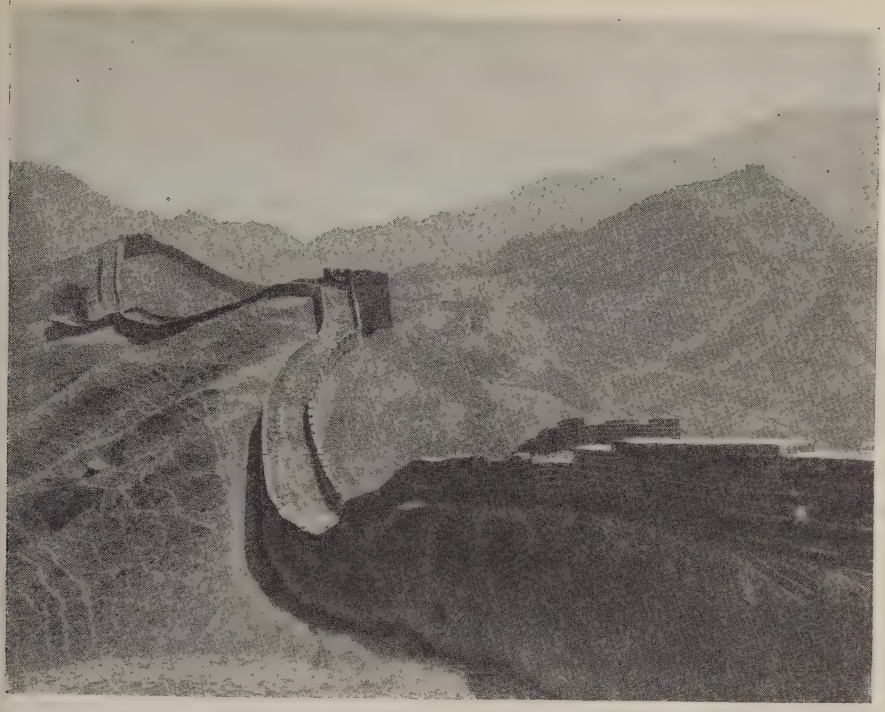
SHANGHAI, May 6, 1948.—Industry in China is concentrated in the main coastal areas of Shanghai and Tientsin, and present disturbances throughout the interior and in North China are creating ever greater concentration. This applies particularly to Shanghai, as the former active ports of Tsingtao and Tientsin have been forced to confine their activities to a minimum, due to communist operations in the immediate hinterland and to distribution difficulties by land and sea.

In the southern provinces, particularly in Canton, conditions have been relatively stable, and industry is operating at a fairly high level. Throughout China, however, there is an acute demand for new and replacement machinery, in addition to raw materials. The shortage of fuel and power, due to the disruption of communications, has caused much uncertainty, particularly in those plants where expansion is overdue.

The importation of raw materials immediately after VJ Day, before the imposition of import and exchange restrictions, is largely responsible for the fact that industry as a whole has kept functioning fairly satisfactorily. Another factor has been the large volume of "unauthorized shipments" that have found their way into Central China's industrial areas, mainly via Hong Kong and the South China coastline. Recently, however, the Hong Kong and Macao Governments agreed to impose drastic controls in conjunction with the Chinese Maritime Customs to counter smuggling activities. Although these measures have greatly improved the relations between these areas and China, and will serve to assist the Chinese Government in conserving foreign exchange, trade as a whole in both Shanghai and Hong Kong will undoubtedly suffer further restrictions.

Marked Increase in Industrialization in Hong Kong

Continued uncertainty and unsettled conditions throughout the industrial areas of Central and North China have caused a marked increase in industrialization in Hong Kong, chiefly through branches of Shanghai and North China enterprises, designed to supply China's traditional markets in Southeast Asia and to benefit by Imperial preferences within the Empire. Hong Kong's greater stability of currency and labour, and the comparative freedom for importing raw materials and exporting finished goods has provided a strong magnet to firms based on Shanghai. Conservative opinion, however, which has always felt that a prosperous Hong Kong is dependent upon an equally prosperous China, has expressed some misgivings regarding the substantial transfer of funds to the southern Colony, and that market is being used primarily for short-term investment.



China—Great Wall of China, which was built between 228 and 210 B.C., and winds for 1,400 miles over mountains and across valleys. It reaches an average height of twenty feet, has a roadway on top thirteen feet wide, and is fortified at 100-yard intervals by a tower. The purpose of this wall was to keep out northern barbarians.

Recent Local Disturbances Typical of Long-standing Conditions

In this connection, reference is made to the recent disturbances in Canton and Kowloon, which had their repercussions in demonstrations in Shanghai and the chief Central China cities. While incidents of this kind are exceedingly disturbing to those individuals and interests immediately affected, responsible foreign and Chinese officials feel they should not be taken too seriously. They are typical of the conditions that have existed in China for many years past. As long as they remain isolated incidents and are not fanned by organized pressure into widespread disturbances, they have little or no lasting effect on the general course of trade or the foreign relations of Chinese in the country as a whole.

Though the industrial picture in China is far from promising and the outlook for the immediate future is probably worse than at any time in modern history, experience has shown that China has a remarkable capacity for rapid recovery from apparently hopeless positions. Perhaps this is because the margin between bare existence and what to the labourer in China is prosperity is extremely small, whereas this factor multiplied by a population of some 400 million becomes a factor of some importance.

Prompt and courteous attention to letters pays dividends with foreign trade customers. Use the language of the customer and refer to dates and file numbers where these have been indicated in the customer's letters. (*See our ABC of Canadian Export Trade, page 45.*)

Monthly Summary of Foreign Trade

Canadian Exports (Excluding Gold)

Months	Average 1935-39	1938	1943	1944	1945	1946	1947	1948
	(Millions of Dollars)							
January	62·8	70·3	177·3	242·0	230·5	189·1	208·6	235·4
February	57·4	59·6	167·7	227·2	236·4	153·1	179·5	208·3
March	71·1	73·3	205·2	282·7	301·2	178·4	209·0	228.4
April	48·5	50·9	227·7	282·9	312·3	178·5	190·9	212·3
May	75·6	67·0	250·6	368·4	315·2	197·0	267·8	282·3
June	73·3	66·0	249·2	343·2	322·8	166·7	272·7	.....
July	74·4	66·2	303·6	278·7	282·7	188·7	236·6	.....
August	77·1	69·1	292·9	257·0	295·0	242·7	221·3	.....
September	76·8	72·2	244·9	264·6	220·8	169·8	218·6	.....
October	91·3	88·2	259·8	314·0	227·9	204·2	250·8	.....
November	95·0	86·0	289·9	312·5	238·6	232·2	253·1	.....
December	81·3	68·9	302·6	266·9	234·8	211·9	266·2	.....
Total	884·5	837·6	2,971·5	3,440·0	3,218·3	2,312·2	2,774·9	1,166·6

Canadian Imports (Excluding Gold)

Months	Average 1935-39	1938	1943	1944	1945	1946	1947	1948
	(Millions of Dollars)							
January	44·6	49·7	127·3	126·4	129·7	140·3	173·8	206·1
February	42·9	47·0	114·4	138·4	112·4	117·0	177·1	182·2
March	59·1	65·1	146·1	150·8	132·5	139·9	208·9	197.1
April	45·3	48·9	150·7	137·5	133·8	160·8	225·6	226·7
May	66·1	67·1	154·4	159·0	143·8	164·2	240·3	225·1
June	60·5	58·9	146·8	152·5	146·5	157·7	231·1	.....
July	57·6	55·8	150·9	148·5	138·7	161·6	226·8	.....
August	57·9	57·0	149·1	157·3	128·1	163·2	204·6	.....
September	59·6	56·4	137·3	159·7	122·3	156·1	208·1	.....
October	68·6	63·9	162·9	160·1	134·4	186·4	254·5	.....
November	70·1	63·3	160·3	141·6	142·4	198·2	229·1	.....
December	52·2	44·3	134·9	127·2	121·2	181·9	194·2	.....
Total	684·6	677·5	1,735·1	1,758·9	1,585·8	1,927·3	2,573·9	1,037·1

Balance of Trade with all Countries (Excluding Gold)

Months	Average 1935-39	1938	1943	1944	1945	1946	1947	1948
	(Millions of Dollars)							
January	+ 19·0	+ 21·8	+ 51·2	+ 119·6	+ 104·2	+ 51·0	+ 36·7	+ 33·0
February	+ 15·3	+ 13·5	+ 55·1	+ 90·9	+ 128·0	+ 37·7	+ 4·7	+ 28·1
March	+ 13·0	+ 9·2	+ 60·5	+ 139·2	+ 174·5	+ 40·0	+ 3·0	+ 33.9
April	+ 4·0	+ 2·6	+ 78·4	+ 149·2	+ 184·3	+ 19·5	− 32·2	− 11·6
May	+ 10·6	+ ·8	+ 98·9	+ 211·8	+ 174·9	+ 34·6	+ 30·9	+ 62·4
June	+ 13·8	+ 7·9	+ 104·4	+ 193·5	+ 180·7	+ 11·1	+ 45·3	.....
July	+ 17·9	+ 11·4	+ 155·6	+ 133·3	+ 147·4	+ 29·6	+ 12·8	.....
August	+ 20·3	+ 12·9	+ 146·0	+ 101·9	+ 172·5	+ 82·8	+ 20·3	.....
September	+ 18·3	+ 16·7	+ 110·1	+ 107·6	+ 102·7	+ 15·8	+ 13·4	.....
October	+ 23·8	+ 25·3	+ 100·0	+ 158·4	+ 98·5	+ 20·2	− 0·8	.....
November	+ 26·2	+ 23·5	+ 133·1	+ 175·9	+ 98·8	+ 37·0	+ 26·9	.....
December	+ 30·3	+ 25·6	+ 173·1	+ 142·9	+ 115·2	+ 32·4	+ 76·7	.....
Total	+ 212·5	+ 171·2	+1,266·3	+1,724·2	+1,681·6	+ 411·9	+ 237·8	+ 145·8

Note.—Throughout this bulletin, totals represent unrounded figures, hence may vary slightly from rounded amounts.

Canadian Exports to the United Kingdom (Excluding Gold)

Months	Average 1935–39	1938	1943	1944	1945	1946	1947	1948
	(Millions of Dollars)							
January	25·5	33·6	42·6	94·8	83·2	51·1	50·5	64·9
February	23·6	27·3	51·9	78·2	67·5	37·9	44·9	51·7
March	26·4	27·8	65·0	110·4	108·8	50·5	47·6	59.2
April	16·4	18·8	89·3	101·2	109·1	41·0	43·1	44·4
May	30·5	27·9	95·5	140·2	115·6	54·9	90·5	85·1
June	28·9	25·6	105·6	127·9	94·6	30·6	76·2	.....
July	30·5	25·8	124·4	104·9	83·9	40·4	69·4	.....
August	31·3	26·7	111·9	90·2	66·6	71·9	66·0	.....
September	30·8	28·9	77·7	94·4	58·8	54·3	54·5	.....
October	38·4	36·0	73·4	112·6	56·3	47·7	66·8	.....
November	41·4	35·8	106·0	102·2	52·4	57·9	69·3	.....
December	30·0	25·5	89·5	77·9	66·4	59·4	72·5	.....
Total	353·6	339·7	1,032·6	1,235·0	963·2	597·5	751·2	305·2

Canadian Imports from the United Kingdom (Excluding Gold)

Months	Average 1935–39	1938	1943	1944	1945	1946	1947	1948
	(Millions of Dollars)							
January	8·0	8·9	8·6	7·1	9·4	20·1	14·3	21·6
February	8·1	8·8	9·6	6·7	6·7	13·0	10·5	17·9
March	10·9	11·5	12·2	9·8	9·3	14·4	13·8	21.6
April	8·4	9·2	12·7	8·4	12·0	21·2	12·7	24·6
May	12·7	11·9	12·5	13·0	15·2	18·8	15·2	27·4
June	10·8	9·2	9·7	9·4	13·8	23·4	18·1	.....
July	11·3	9·7	14·2	5·9	12·0	21·9	17·7	.....
August	11·4	10·4	10·9	4·6	10·7	14·5	15·1	.....
September	10·5	10·0	9·9	7·1	9·6	12·0	15·6	.....
October	11·0	11·6	13·3	18·1	12·1	15·6	18·3	.....
November	13·0	11·0	12·8	11·1	14·8	14·9	17·8	.....
December	8·0	7·0	8·6	9·4	14·9	11·7	20·3	.....
Total	124·0	119·3	135·0	110·6	140·5	201·4	189·4	113·1

Balance of Trade with the United Kingdom (Excluding Gold)

Months	Average 1935–39	1938	1943	1944	1945	1946	1947	1948
	(Millions of Dollars)							
January	+ 17·7	+ 24·8	+ 34·1	+ 88·2	+ 74·5	+ 31·2	+ 36·3	+ 43·4
February	+ 14·6	+ 18·7	+ 42·7	+ 72·0	+ 61·4	+ 24·9	+ 34·5	+ 33·9
March	+ 15·6	+ 16·4	+ 53·0	+ 100·7	+ 101·5	+ 36·2	+ 33·9	+ 37.7
April	+ 9·1	+ 9·6	+ 77·0	+ 93·0	+ 98·9	+ 19·8	+ 30·4	+ 19·8
May	+ 17·7	+ 16·2	+ 83·9	+ 127·3	+ 101·1	+ 36·2	+ 75·6	+ 57·8
June	+ 18·3	+ 16·6	+ 96·1	+ 118·6	+ 81·3	+ 7·3	+ 58·2	.....
July	+ 19·4	+ 16·3	+ 111·0	+ 99·3	+ 72·2	+ 18·6	+ 52·0	.....
August	+ 20·0	+ 16·5	+ 101·4	+ 85·7	+ 56·8	+ 57·5	+ 51·1	.....
September	+ 20·3	+ 19·0	+ 68·0	+ 87·7	+ 49·2	+ 42·4	+ 39·4	.....
October	+ 27·5	+ 24·6	+ 60·3	+ 94·9	+ 44·8	+ 32·1	+ 48·7	.....
November	+ 28·4	+ 24·8	+ 93·7	+ 91·3	+ 37·7	+ 43·3	+ 51·6	.....
December	+ 22·1	+ 18·6	+ 81·0	+ 68·7	+ 51·6	+ 47·8	+ 52·5	.....
Total	+ 230·8	+ 222·1	+ 902·3	+ 1,127·5	+ 830·9	+ 397·4	+ 564·3	+ 192·6

Canadian Exports to the United States (Excluding Gold)

Months	Average 1935–39	1938	1943	1944	1945	1946	1947	1948
	(Millions of Dollars)							
January	22·1	20·0	91·2	85·3	84·7	62·3	79·5	105·0
February	19·7	16·8	81·1	91·6	91·5	57·6	69·4	94·8
March	25·9	22·7	88·1	97·4	103·3	66·5	83·1	112.5
April	20·1	18·0	81·7	120·3	109·1	71·4	88·3	109·2
May	26·1	20·4	88·8	131·9	117·2	72·2	79·8	114·7
June	25·1	20·0	90·9	111·2	112·3	66·5	82·0	.....
July	25·9	21·0	90·8	98·8	102·7	74·8	82·1	.....
August	28·3	25·3	91·2	86·0	112·6	75·0	81·4	.....
September	29·4	25·1	94·0	110·5	84·8	69·6	87·5	.....
October	33·5	28·0	112·8	123·0	88·4	99·1	102·4	.....
November	31·9	28·4	108·3	118·9	101·2	89·2	92·9	.....
December	33·3	24·7	130·2	126·4	88·9	83·9	106·0	.....
Total	321·3	270·5	1,149·2	1·301·3	1,197·0	887·9	1,034·2	536·3

Canadian Imports from the United States (Excluding Gold)

Months	Average 1935–39	1938	1943	1944	1945	1946	1947	1948
	(Millions of Dollars)							
January	28·7	32·3	104·8	106·3	101·8	97·4	136·4	150·0
February	27·9	31·2	94·2	115·8	92·8	86·0	138·4	136·8
March	38·0	42·9	120·0	123·3	105·3	100·1	165·1	138.3
April	29·2	31·4	124·4	114·4	102·7	114·8	181·6	159·5
May	38·3	40·5	124·0	127·0	104·8	113·4	184·7	145·0
June	36·4	37·1	121·1	122·2	110·7	106·6	174·7	.....
July	33·4	34·1	120·0	124·0	103·5	112·5	168·9	.....
August	33·7	35·3	124·9	138·3	96·8	123·1	155·3	.....
September	36·2	34·7	113·5	135·6	89·6	115·8	163·0	.....
October	42·5	38·5	134·5	121·4	101·3	140·4	190·4	.....
November	40·8	37·6	130·9	116·1	103·3	149·5	174·4	.....
December	33·6	29·2	111·5	102·9	89·9	145·6	141·7	.....
Totals	418·7	424·7	1,423·7	1,447·2	1,202·4	1,405·3	1,974·7	729·5

Balance of Trade with the United States (Excluding Gold)

Months	Average 1935–39	1938	1943	1944	1945	1946	1947	1948
	(Millions of Dollars)							
January	− 5·9	− 11·3	− 12·8	− 18·3	− 15·0	− 33·2	− 55·8	− 43·2
February	− 7·5	− 13·8	− 12·0	− 22·7	+ 1·9	− 27·1	− 67·1	− 40·4
March	− 10·3	− 19·5	− 30·9	− 19·4	+ 1·7	− 32·4	− 80·2	− 24.2
April	− 8·4	− 12·8	− 41·9	+ 9·0	+ 10·1	− 41·9	− 91·6	− 48·0
May	− 11·0	− 19·5	− 33·8	+ 6·8	+ 15·0	− 39·9	− 102·7	− 28·7
June	− 10·5	− 16·5	− 28·7	− 9·0	+ 3·8	− 38·5	− 90·5	.....
July	− 6·6	− 12·4	− 27·3	− 23·3	+ 1·5	− 35·9	− 84·9	.....
August	− 4·5	− 9·4	− 32·3	− 50·4	+ 18·2	− 45·6	− 71·6	.....
September	− 5·9	− 8·9	− 17·6	− 23·0	− 2·3	− 44·7	− 73·8	.....
October	− 8·0	− 9·7	− 20·4	+ 5·2	− 9·9	− 39·4	− 86·2	.....
November	− 7·7	− 8·6	− 20·4	+ 6·4	− 0·1	− 58·1	− 79·8	.....
December	− 0·7	− 3·7	+ 21·2	+ 25·9	+ 0·1	− 60·1	− 33·9	.....
Total	− 87·0	− 146·0	− 257·0	− 112·7	+ 25·0	− 496·7	− 918·1	− 184·6

Egypt—Canadian combine rice harvester providing a demonstration on the State Farm at Sakha, in the presence of the Under Secretary of State for Agriculture, H. E. Mohammed el Kelany Bey, and a number of leading agriculturists.

Canadian Fertilizer to be Shipped to Egypt

Canada will supply Egypt with 100,000 tons of chemical fertilizer during the next two years. An agreement recently concluded between Canadian companies and the "Credit Agricole d'Egypte" provides for delivery of 50,000 tons per year from July, 1948, to June, 1950. A total of 25,000 tons will be shipped over a period extending from July to October each year, while the other 25,000 tons will be supplied from November to February.

New Fibre Bag Factory for Belgian Congo

Leopoldville, May 27, 1948.—(FTS)—With a view to relieving the shortage of jute sacking and bags which has been felt to a considerable degree in the Belgian Congo, a new company has been formed with a capital of 48,000,000 francs for the spinning and weaving of fibres of all types for packing purposes. The associates in the new venture consist for the most part of large Congo firms, particularly those engaged in the cotton trade.

Aside from cotton, the fibre most cultivated in the Belgian Congo is known as urena-lobata. It is said to be whiter, more pliant and regular and, above all, more resistant to humidity and stronger than jute. It is primarily a native culture. Sisal, a European culture, is much less important. Up to the present time practically the entire production of fibres has been exported. Exports of fibres from the Belgian Congo in 1941 totalled 8,465 metric tons; in 1942, 6,322; 1943, 9,031; 1944, 9,498; 1945, 7,019; and in 1946, 8,583 metric tons.

George R. Paterson Elected Chairman of I.E.F.C.

G. R. Paterson

George Roscoe Paterson, Agricultural Counsellor at the Canadian Embassy, in Washington, has been elected chairman of the International Emergency Food Committee, of the Food and Agriculture Organization of the United Nations. The election took place on June 30 at a meeting in Washington of representatives from Australia, Belgium, Brazil, Canada, China, France, India. Italy, Mexico, the United Kingdom and the United States. Committee members are elected at six-monthly intervals, the new member countries being chosen on this occasion being Belgium, Italy and Mexico, which replace Egypt, the Netherlands and Norway on the 11-member committee.

Chen Chi-Mai, representing China, was elected vice-chairman. Mr. Paterson was formerly Canadian member on the IEFC. With his election as chairman, D. W. Jackson, Assistant Commercial Secretary for Canada in Washington, has been appointed alternate member.

Mr. Paterson was born at Scarborough, Ont., in 1898, and graduated from the University of Toronto (Ontario Agricultural College, at Guelph) in 1924 with a B.S.A. degree. He secured his M.S. degree at Iowa State College, Ames, Iowa, in 1926. Mr. Paterson joined the Trade Commissioner Service in 1939, being appointed Assistant Trade Commissioner in London. The following year he was promoted Trade Commissioner in London, and transferred to Washington in November, 1943.

Prior to joining the Trade Commissioner Service, Mr. Paterson was employed as a marketing specialist and agricultural representative with the Ontario Department of Agriculture. During and since the war he has represented Canada on a number of committees, including the Inter-Allied Relief Committee, London, 1942-43; Hot Springs Conference, 1943; UNRRA Conference, in Atlantic City, 1943; UNRRA Conference, in Montreal, 1944; First FAO Conference, in Quebec City, 1945; Combined Food Board, in Washington, 1943 to 1946. He has been Canadian member of the IEFC since July, 1946, and served as chairman of the meat committee of that organization.

Foreign Trade Inquiries

Canadian firms interested in any inquiries listed in this section are requested to communicate directly with the companies or individuals concerned. As far as can be ascertained, they are in good standing, though the Foreign Trade Service cannot assume responsibility for business transactions undertaken with them. A copy of the initial reply from the inquirer should be forwarded to the Department of Trade and Commerce for follow-up purposes. Confidential information concerning the financial status of inquirers may be secured from this Department by bona fide Canadian manufacturers and exporters. In writing this Department in connection with inquiries, the name of the inquirer, file number of the inquiry and the date of issue of *Foreign Trade* in which it was shown should be supplied.

89. **Cuba**—Hugo May, P.O. Box 547, Havana, Cuba, a well-established manufacturers' representative, is interested in representing a Canadian manufacturer of transparent plastic material for raincoats on an agency basis. File: T.E. 322.

Trade and Tariff Regulations

Belgian Congo Introduces Import Licences

Leopoldville, June 23, 1948.—(FTS)—Import licences are required for all commodities entering the Belgian Congo, and will only be issued if the authorities certify that the goods concerned are essential to the economy of this colony. There has been a liberal interpretation of this requirement, and requests have been refused only in a few cases. It is understood that tea is the only item for which no import licences will be issued.

No regulations have been announced as yet, though the present system was introduced during the latter part of May, corresponding to that prevailing during the war, when an Import Commission had authority to control imports by licence. In practice, this applied only to textiles and certain foodstuffs. It has now been extended to cover all commodities. The new control system is possibly being introduced to prevent importers from placing abnormally large orders before the new controls take effect.

It is understood that a quota system for automobiles may be introduced, as the authorities maintain that imports of new cars have reached unreasonable proportions during the past few years. This would not apply to trucks, however.

Further Quotas and Quota Periods Announced by Eire

Dublin, June 9, 1948.—(FTS)—By seven Orders of the Eire Government, issued under the Control of Imports Acts, 1934, and 1937, further quotas and quota periods have been announced as follows:

Leather Footwear—300,000 articles; quota for previous six months, 1,250,000 articles.

Rubber-proofed Clothing—6,000 articles; this amount is identical with that for the previous six months.

Brushes, Brooms and Mops (domestic or household)—24,000 articles; previous six months' quota was 48,000 articles.

Brushes (for human use)—96,000 articles; previous six months' quota, 240,000 articles.

Brushes—96,000 articles; this amount is equal to that fixed for the preceding six months.

Hats, Caps, Hoods and Shapes—80,000 articles; previous quota unchanged.

Metal Screws—100,000 gross. Of this amount 96,000 gross must be of Canadian or United Kingdom manufacture. Previous six months' quota was 50,000 gross, of which 48,000 gross were of Canadian or United Kingdom origin.

The period fixed in all of the above cases extends from July 1, 1948, to December 31, 1948.

The drastic reduction in the present allocation for footwear is accounted for by the fact that local output of footwear has now reached a high figure. Production has been such that stocks have accumulated in the warehouses to the extent that many of the Irish footwear factories are now on short time. This situation has been aggravated by large purchases, chiefly from the United Kingdom, of footwear when free buying was permitted during the past twelve months.

While the Order covers boots and shoes, the Department of Industry and Commerce will not grant any licences for the importation of boots, as adequate stocks are locally produced; therefore the Order will actually be operated to control shoe imports.

A similar situation exists with regard to brushes and brooms, so that adequate stocks are at present on hand.

United States Tariff Concessions to India and Norway in Effect

Presidential proclamation of June 25 puts into effect as of July 9 and 11 the tariff concessions in Schedule XX of the General Agreement on Tariffs and Trade of primary interest to India and Norway respectively. United States reductions in duty now in effect of interest to Canadian exporters include:

Par. No.		*Former Rate of Duty*	*New Rate of Duty.*
52.	Whale oil	6c. per gal.	3c. per gal.
208(a)	Mica, unmanufactured: Valued at above 15 cents per pound	4c. per lb. and 25% ad val.	2c. per lb. and 15% ad val.
208c.	Mica films and splittings, not cut or stamped to dimensions: Not above 12/10,000 inch in thickness.	25% ad val.	12½% ad val.
	Over 12/10,000 inch in thickness	40% ad val.	20% ad val.
208d.	Mica films and splittings cut or stamped to dimensions	45% ad val.	22½% ad val.
302(d)	Ferromanganese, containing more than 1 per cent and less than 4 per cent of carbon	1⅞c. per lb. on manganese content.	15/16c. per lb. on manganese content.
302(e)	Manganese silicon containing more than 45 per cent of manganese	1⅞c. per lb. on manganese content and 15% ad val.	1c. per lb. on manganese content and 10% ad. val.
302(e)	Ferromanganese containing not more than 1 per cent of carbon	1⅞c. per lb. on manganese content and 15% ad val.	15/16c. per lb. on manganese content and 10% ad val.
717(c)	Fish dried and unsalted: Cod, haddock, hake, pollock and cusk	1¼c. per lb.	⅝c. per lb.
718(a)	Sardines, neither skinned or boned, but otherwise prepared or preserved in any manner, when packed in oil or in oil and other substances: Valued at over 18 but not over 23 cents per pound, including the weight of the immediate container	30% ad val.	20% ad val.
	Valued at over 23 cents per pound, including the weight of the immediate container	30% ad val.	15% ad val.
1502.	Tennis racquets	30% ad val.	17½% ad val.
1735.	Fish hooks, finished or unfinished, not specially provided for	45% ad val.	35% ad val.

Under the General Agreement, India reduced the duty on a number of products of interest to Canada, including condensed milk, dehydrated vegetables, grass seeds, canned fish, canned soups, penicillin, gasoline stoves and electric carbons.

Under the General Agreement, Norway's reductions in duty include apples, canned lobster, canned and salted salmon, aircraft, automobile trucks and parts for automobiles. Duty-free entry was also bound on most grains, wheat flour, nickel matte and copper in pigs.

Radio Telephone Connects Canada and Congo

Canada and the Belgian Congo are now linked by radio telephone, the service having been inaugurated on May 15 without any particular ceremony. The rate is $15 for three minutes, and the nominal call time is between 5 p.m. and 5 a.m., Standard Time. Arrangements can be made for calls to be placed at other hours, however. Calls for North America are routed through Belgium.

Trade Commissioners on Tour

CANADIAN Trade Commissioners return periodically from their posts in foreign lands to familiarize themselves with conditions in this country and the special requirements of the commercial community. They are in a position to furnish information concerning markets in their respective territories and possible sources of supply. Exporters and importers are urged to communicate with these officers, when in their vicinity, and to discuss the promotion of their particular commercial interests, now and in the future. Arrangements for interviews with these trade commissioners should be made directly through the following trade associations in the areas concerned:

Ottawa—Foreign Trade Service, Department of Trade and Commerce

Brantford—Board of Trade.
Calgary—Board of Trade.
Charlottetown—Board of Trade.
Edmonton—Canadian Manufacturers' Association.
Fredericton—Chamber of Commerce.
Guelph—Board of Trade.
Halifax—Board of Trade.
Hamilton—Chamber of Commerce.
Kitchener—Chamber of Commerce.
London—Chamber of Commerce.
Montreal—Montreal Board of Trade.
Pembroke—Chamber of Commerce.
Quebec City—Board of Trade.
Regina—Chamber of Commerce.
Saint John—Board of Trade.
Sarnia—Chamber of Commerce.
St. Catharines—Chamber of Commerce.
Toronto—Canadian Manufacturers' Association.
Vancouver—H. W. Brighton, Department of Trade and Commerce, 355 Burrard Street.
Welland—Board of Trade.
Windsor—Chamber of Commerce.
Winnipeg—Canadian Manufacturers' Association.

R. G. C. Smith, Commercial Secretary for Canada in Havana for the past two years, is touring those sections of this country that are principally concerned in exports to the southern market. On completion of his tour, he will sail for Rome to which he has been posted as Commercial Secretary for Canada.

Saint John—August 24-26.
Halifax—August 27-September 2.
Charlottetown—September 3-4.
Penticton—September 13-14.
Vancouver—September 16-21.

M. B. Palmer, Canadian Trade Commissioner in Kingston, Jamaica, has returned to this country on tour, which commenced in Montreal on June 14, 1948. He will discuss with interested businessmen factors affecting trade relations between this country and Jamaica.

Toronto—July 12-22.
Welland, St. Catharines—July 23.
Hamilton—July 26-27.
Brantford, Paris—July 28.
Windsor, Walkerville—July 29-30.
Sarnia—July 31.
London—August 3.
Guelph—August 4.
Kitchener—August 5.
Winnipeg—August 9.
Calgary—August 12.

Exercise care in meeting specifications. Where quotations are made against sample, see to it that the shipment is up to sample standard and keep it that way in subsequent orders. If any substitutions have to be made, obtain the customer's consent before making the change. *(See our ABC of Canadian Export Trade, page 45.)*

Ocean-Going Sailing Schedules

Information contained in the following list of sailings, such as destination, port of departure, loading date, name of ship and operator, is furnished by steamship companies and agents concerned. This is the latest available and subject to change after *Foreign Trade* has gone to press, particularly as this relates to the loading date and name of vessel.

The loading date and name of ship are not indicated in some instances, due to the fact that on certain routes information available is not sufficiently definite to mention the steamer that will be placed on a berth for the destination shown. The name of the probable operator is given, however, and exporters should seek further particulars from the operator or agent indicated.

Departures from Montreal

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Aden—			
Port Aden	July 29–Aug. 2	*Singkep*	Cunard Donaldson
Port Aden	August 24–28	*Melampus*	Cunard Donaldson
Africa-East—			
Lourenço Marques	July 14–25	*New Texas*	Elder Dempster
Lourenço Marques	July 26–Aug. 5	*Fantee*	Elder Dempster
Lourenço Marques	July 26–28	*Colchester County*	March Shipping
Lourenço Marques	August 7–17	*Calumet*	Elder Dempster
Lourenço Marques	August 18–29	*Cabano*	Elder Dempster
Lourenço Marques	August 18–19	*Vancouver County*	March Shipping
Lourenço Marques	August 20	*Norden*	Kerr Steamships
Lourenço Marques	September 1–11	*Cargill*	Elder Dempster
Lourenço Marques	September 20	*Thorshall*	Kerr Steamships
Beira	July 14–25	*New Texas*	Elder Dempster
Beira	August 19–29	*Cabano*	Elder Dempster
Lourenço Marques, Mombasa	August 20	*Norden*	Kerr Steamships
	September 20	*Thorshall*	Kerr Steamships
Africa-South—	July 14–25	*New Texas*	Elder Dempster
	July 26–Aug. 5	*Fantee*	Elder Dempster
Cape Town	July 26–28	*Colchester County*	March Shipping
Port Elizabeth	August 7–17	*Calumet*	Elder Dempster
East London	August 19–29	*Cabano*	Elder Dempster
Durban	August 18–19	*Vancouver County*	March Shipping
	August 20	*Norden*	Kerr Steamships
	September 1–11	*Cargill*	Elder Dempster
	September 20	*Thorshall*	Kerr Steamships
Argentina—			
Buenos Aires	July 19–24	*Mormacmar*	Montreal Shipping
Buenos Aires	August 7–11	*English Prince*	Furness Withy
Buenos Aires	August 12–17	*Royal Prince*	Furness Withy
Buenos Aires	August 17–21	*Bowplate*	Cunard Donaldson
Australia—			
Brisbane, Sydney, Newcastle, Geelong, Melbourne, Adelaide	Aug. 26–Sept. 1	*Port Caroline*	Montreal Australia New Zealand Line

Departures from Montreal—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Australia—Con.			
Brisbane, Sydney, Geelong, Melbourne, Adelaide	July 28–Aug. 4	*Paparoa*	Montreal Australia New Zealand Line
Belgian Congo—			
Matadi	July 26–28	*Colchester County*	March Shipping
Belgium—			
Antwerp	July 20–26	*Beaverglen* (r)	Canadian Pacific
Antwerp	July 27–Aug. 2	*Domfront*	Furness Withy
Antwerp	July 27	*Hada County*	Canada Steamships
Antwerp	July 29	*Grey County*	Canada Steamships
Antwerp	July 30	*Hedel*	Shipping Limited
Antwerp	August 1–5	*Ida Bakke* (r)	Montreal Shipping
Antwerp	August 5	*Prins Willem Van Oranje*	Shipping Limited
Antwerp	August 6–14	*Sein*	Furness Withy
Antwerp	August 7–14	*Beckenham*	Cunard Donaldson
Antwerp	August 16	*Brant County*	Canada Steamships
Antwerp	August 17	*Prins Willem IV*	Shipping Limited
Antwerp	September 3–10	*Beaconsfield*	Cunard Donaldson
Brazil—			
Rio de Janeiro	July 19–24	*Mormacmar*	Montreal Shipping
Rio de Janeiro	August 7–11	*English Prince*	Furness Withy
Santos	August 12–17	*Royal Prince*	Furness Withy
Santos	August 17–21	*Bowplate*	Cunard Donaldson
British Honduras—			
Belize	August 2–6	*Fort Panmure*	Saguenay Terminals
Canal Zone—			
Cristobal	August 2–6	*Fort Panmure*	Saguenay Terminals
Celebes—			
Macassar	July 28–Aug. 2	*Steel Scientist*	Isthmian Steamships
Ceylon—			
Colombo	July 15–20	*City of Lille*	McLean Kennedy
Colombo	July 25–30	*Gulfside*	March Shipping
Colombo	July 28–Aug. 2	*Singkep*	Cunard Donaldson
Colombo	August 1–5	*Martha Kleppe*	McLean Kennedy
Colombo	August 15–20	*City of Agra*	McLean Kennedy
Colombo	September 1–5	*City of Chelmsford*	McLean Kennedy
China—			
Shanghai	July 20–25	*Oceanside*	March Shipping
Shanghai	August 5–10	*City of Poona*	McLean Kennedy
Shanghai	August 15–20	*Ajax*	Cunard Donaldson
Colombia—			
Barranquilla	July 21–27	*Apollo* (r)	Saguenay Terminals
Barranquilla	August 9–12	*Benny* (r)	Saguenay Terminals
Barranquilla	September 2–5	*Shakespeare Park*	Saguenay Terminals
Cuba—			
Havana, Santiago	July 20–25	*Sparreholm*	Swedish American
Denmark—			
Copenhagen	July 27–28	*Erland*	Swedish American
Copenhagen	July 29–30	*Polycrest*	Swedish American
Dominican Republic—			
Ciudad Trujillo	August 2–6	*Fort Panmure*	Saguenay Terminals
Ciudad Trujillo	September 2–5	*Shakespeare Park*	Saguenay Terminals
Eire—			
Dublin	July 29–Aug. 2	*Inishowan Head*	McLean Kennedy
Dublin	August 18–22	*Lord O'Neill*	McLean Kennedy
Dublin, Cork	July 20	*Irish Ash*	Shipping Limited

Departures from Montreal—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Egypt—			
Alexandria	July 29–Aug. 2	*Singkep*	Cunard Donaldson
Port Said	August 24–28	*Melampus*	Cunard Donaldson
Suez	September 10–14	*Sloterdyk*	Cunrard Donaldson
Alexandria	July 25	*City of Lille*	McLean Kennedy
Port Sudan			
Finland—			
Helsinki	July 27–28	*Erland*	Swedish American
Helsinki	July 29–30	*Polycrest*	Swedish American
France—			
Le Havre	July 27	*Hada County*	Canada Steamships
Le Havre	July 27–Aug. 2	*Domfront*	Furness Withy
Le Havre	July 29	*Grey County*	Canada Steamships
Le Havre	August 6–14	*Sein*	Furness Withy
Le Havre	August 16	*Brant County*	Canada Steamships
Marseilles	August 10–16	*Capo Arma*	Furness Withy
Germany—			
Hamburg	July 20–26	*Beaverbrae* (r)	Canadian Pacific
Hamburg	August 1–5	*Ida Bakke* (r)	Montreal Shipping
Hamburg	August 7–14	*Beckenham*	Cunard Donaldson
Hamburg	September 3–10	*Beaconsfield*	Cunard Donaldson
Gibraltar	August 24–31	*Mont Gaspe*	Montreal Shipping
Greece—			
Piraeus	July 19–27	*Mont Alta*	Montreal Shipping
Guatemala—			
Puerto Barrios	August 2–6	*Fort Panmure*	Saguenay Terminals
Haiti—			
Port au Prince	August 2–6	*Fort Panmure*	Saguenay Terminals
Port au Prince	September 2–5	*Shakespeare Park*	Saguenay Terminals
Hong Kong	July 25–30	*Oceanside*	March Shipping
	August 5–10	*City of Poona*	McLean Kennedy
	August 15–10	*Ajax*	Cunard Donaldson
India and Pakistan—			
Karachi	July 25–30	*Gulfside*	March Shipping
Bombay	August 1–5	*Martha Kleppe*	McLean Kennedy
Madras	August 15–20	*City of Agra*	McLean Kennedy
Calcutta	September 1–5	*City of Chelmsford*	McLean Kennedy
Karachi	July 15–20	*City of Lille*	McLean Kennedy
Bombay			
Madras			
Italy—			
Naples	July 19–27	*Mont Alta*	Montreal Shipping
Genoa	August 24–31	*Mont Gaspe*	Montreal Shipping
West Coast Ports	August 10–16	*Capo Arma*	Furness Withy
Malaya—	July 28–Aug. 2	*Steel Scientist*	Isthmian Steamships
Penang	July 29–Aug. 2	*Singkep*	Cunard Donaldson
Port Swettenham	August 24–28	*Melampus*	Cunard Donaldson
	September 10–14	*Sloterdyk*	Cunard Donaldson
Mediterranean—			
Central and Western	July 19–27	*Mont Alta*	Montreal Shipping
	August 24–31	*Mont Gaspe*	Montreal Shipping
Mexico—			
Veracruz	July 20–25	*Sparreholm*	Swedish American
Veracruz	July 23–27	*Federal Pioneer*	Federal Commerce
Netherlands	July 30	*Hedel*	Shipping Limited
	August 1–5	*Ida Bakke* (r)	Montreal Shipping
Amsterdam	August 5	*Prins Willem van Oranje*	Shipping Limited
Rotterdam	August 7–14	*Beckenham*	Cunard Donaldson
	August 17	*Prins Willem IV*	Shipping Limited
	September 3–10	*Beaconsfield*	Cunard Donaldson

Departures from Montreal—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Netherlands—Con.			
Rotterdam	July 27	*Hada County*	Canada Steamships
Rotterdam	July 29	*Grey County*	Canada Steamships
Rotterdam	August 16	*Brant County*	Canada Steamships
Netherlands East Indies—			
Batavia, Soerabaya	July 27–Aug. 2	*Steel Scientist*	Isthmian Steamships
Batavia	July 29–Aug. 2	*Singkep*	Cunard Donaldson
Soerabaya	August 24–28	*Melampus*	Cunard Donaldson
Samarang, Cheribon	September 10–14	*Sloterdyk*	Cunard Donaldson
Netherlands West Indies—			
Curaçao	July 21–27	*Apollo* (r)	Saguenay Terminals
Curaçao	August 9–12	*Benny* (r)	Saguenay Terminals
Newfoundland			
St. John's	July 16–20	*Blue Seal*	Montreal Shipping
St. John's	July 22–26	*Blue Peter II*	Montreal Shipping
St. John's	July 24–25	*Atlantic Charter*	Montreal Shipping
St. John's	July 24–27	*Wellington Kent*	Furness Withy
St. John's	August 7–10	*Wellington Kent*	Furness Withy
Corner Brook	July 29	*Gulfport*	Clarke Steamships
New Zealand—			
Auckland, Wellington, Lyttelton, Dunedin	August 21–29	*Port Phillip*	Montreal Australia New Zealand Line
Northern Ireland			
Belfast	July 18–22	*Fanad Head*	McLean Kennedy
Belfast	August 10–14	*Torr Head*	McLean Kennedy
Norway—			
Oslo, Kristiansand, Stavanger, Bergen	July 27–28	*Erland*	Swedish American
	July 29–30	*Polycrest*	Swedish American
Philippines—			
Manila	August 5–10	*City of Poona*	McLean Kennedy
Manila	August 15–20	*Ajax*	Cunard Donaldson
Poland—			
Gdansk	July 27–28	*Erland*	Swedish American
Gdansk	July 29–30	*Polycrest*	Swedish American
Portugal—			
Lisbon	July 19–27	*Mont Alta*	Montreal Shipping
Lisbon	August 24–31	*Mont Gaspe*	Montreal Shipping
St. Pierre et Miquelon	July 24–25	*Atlantic Charter*	Montreal Shipping
	July 24–27	*Wellington Kent*	Furness Withy
	August 7–10	*Wellington Kent*	Furness Withy
Siam—			
Bangkok	July 28–Aug. 2	*Steel Scientist*	Isthmian Steamships
Singapore	July 25–30	*Oceanside*	March Shipping
	July 28–Aug. 2	*Steel Scientist*	Isthmian Steamships
	July 29–Aug. 2	*Singkep*	Cunard Donaldson
	September 10–14	*Sloterdyk*	Cunard Donaldson
Sweden—			
Gothenburg, Malmo, Norrkoping, Stockholm	July 27–28	*Erland*	Swedish American
	July 28–30	*Polycrest*	Swedish American

Departures from Montreal—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
United Kingdom—			
Avonmouth	July 19–24	*Dorelian* (r)	Cunard Donaldson
Avonmouth	July 24–30	*Bristol City*	Furness Withy
Avonmouth	August 4–11	*Moveria*	Cunard Donaldson
Avonmouth	August 11–18	*Delilian*	Cunard Donaldson
Avonmouth	August 23–30	*Norwegian*	Cunard Donaldson
Glasgow	July 26–Aug. 3	*Salacia* (r)	Cunard Donaldson
Glasgow	August 12–19	*Laurentia*	Cunard Donaldson
Glasgow	August 24–31	*Dorelian* (r)	Cunard Donaldson
Hull	August 4–8	*Marengo* (r)	McLean Kennedy
Liverpool	July 18–23	*Empress of Canada* (r)	Canadian Pacific
Liverpool	July 18–22	*Fanad Head*	McLean Kennedy
Liverpool	July 18–25	*Beaverburn*	Canadian Pacific
Liverpool	June 20–25	*Kaipaki*	Cunard Donaldson
Liverpool	June 23–28	*Hillcrest Park*	Cunard Donaldson
Liverpool	July 27	*Beaverburn*	Canadian Pacific
Liverpool	July 29–Aug. 2	*Inishowen Head*	McLean Kennedy
Liverpool	August 7–10	*Ascania* (r)	Cunard Donaldson
Liverpool	August 10–14	*Torr Head*	McLean Kennedy
Liverpool	August 18–22	*Lord O'Neill*	McLean Kennedy
Liverpool	August 18–25	*Fort Musquarro*	Cunard Donaldson
London	July 17–23	*Fort Cadotte*	Cunard Donaldson
London	July 20–26	*Beaverbrae* (r)	Canadian Pacific
London	July 20–26	*Beaverglen* (r)	Canadian Pacific
London	July 21–27	*Beaverdell* (r)	Canadian Pacific
London	July 23–28	*Vandalia*	Cunard Donaldson
London	July 26–Aug. 2	*Asia* (r)	Cunard Donaldson
London	July 30	*Beaverlake* (r)	Canadian Pacific
London	August 2–8	*Sibley Park*	Cunard Donaldson
London	August 9	*Beavercove* (r)	Canadian Pacific
London	August 9–17	*Arabia* (r)	Cunard Donaldson
Manchester	July 21–24	*Manchester City* (r)	Furness Withy
Manchester	July 28–31	*Manchester Regiment* (r)	Furness Withy
Manchester	August 4–7	*Manchester Progress* (r)	Furness Withy
Newport	July 24–30	*Bristol City*	Furness Withy
Swansea	July 24–30	*Bristol City*	Furness Withy
Uruguay—			
Montevideo	July 19–24	*Mormacmar*	Montreal Shipping
Montevideo	August 7–11	*English Prince*	Furness Withy
Montevideo	August 12–17	*Royal Prince*	Furness Withy
Montevideo	August 17–21	*Bowplate*	Cunard Donaldson
Venezuela—			
La Guaira, Maracaibo	July 21–27 / August 9–12	*Apollo* (r) / *Benny* (r)	Saguenay Terminals / Saguenay Terminals
La Guaira, Puerto Cabello	July 12–13 / September 12–13	*Brush* / *Shakespeare Park*	Swedish American / Saguenay Terminals
West Indies—			
Bermuda	July 20–29	**A Ship*	Alcoa Steamships
	July 21–29	*Canadian Challenger* (r)	Canadian National
	August 3–12	**Alcoa Pennant* (r)	Alcoa Steamships
	August 10–17	**Canadian Constructor* (r)	Canadian National
	Aug. 27–Sept. 3	*Canadian Cruiser* (r)	Canadian National
	September 9–17	**Candian Challenger* (r)	Canadian National
Antigua, Barbados, Grenada, St. Kitts, St. Lucia, St. Vincent, Trinidad	July 20–29	**A Ship*	Alcoa Steamships
	July 21–29	*Canadian Challenger* (r)	Canadian National
	August 3–12	**Alcoa Pennant* (r)	Alcoa Steamships
	August 10–17	**Canadian Constructor* (r)	Canadian National
	Aug. 27–Sept. 3	*Canadian Cruiser* (r)	Canadian National
	September 9–17	**Canadian Challenger* (r)	Canadain National
Dominica, Montserrat	July 20–29	**A Ship*	Alcoa Steamships
	July 21–29	*Canadian Challenger* (r)	Canadian National
	August 3–12	**Alcoa Pennant* (r)	Alcoa Steamships
	August 10–17	**Canadian Constructor* (r)	Canadian National
	Aug. 27–Sept. 3	*Canadian Cruiser*	Canadian National
	September 9–17	**Canadian Challenger* (r)	Canadian National

Departures from Montreal—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
West Indies—Con.			
Jamaica	July 20–25	*Sparreholm*	Swedish American
Bahamas	July 24	*Canadian Highlander*	Canadian National
	July 31	*Canadian Observer*	Canadian National
	August 10	*Canadian Victor*	Canadian National
Jamaica	August 18	*Canadian Leader*	Canadian National
	August 24	*Canadian Conqueror*	Canadian National
	September 9–17	**Canadian Challenger*	Canadian National
British Guiana	July 20–29	**A Ship*	Alcoa Steamships
	July 21–29	*Canadian Challenger* (r)	Canadian National
	August 3–12	**Alcoa Pennant* (r)	Alcoa Steamships
	August 10–17	**Canadian Constructor* (r)	Canadian National
	Aug. 27–Sept. 3	*Canadian Cruiser* (r)	Canadian National
	September 9–17	**Canadian Challenger*	Canadian National

Departures from Quebec

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Argentina—			
Buenos Aires	July 21–22	*Brazilian Prince*	Furness Withy
Buenos Aires	August 11–12	*Royal Prince*	Furness Withy
Brazil—			
Rio de Janeiro	July 21–22	*Brazilian Prince*	Furness Withy
Santos	August 11–12	*Royal Prince*	Furness Withy
Colombia—			
Barranquilla	July 28–29	*Apollo* (r)	Saguenay Terminals
Barranquilla	August 7–8	*Benny* (r)	Saguenay Terminals
Barranquilla	September 6–7	*Shakespeare Park*	Saguenay Terminals
Dominican Republic—			
Ciudad Trujillo	September 6–7	*Shakespeare Park*	Saguenay Terminals
Haiti—			
Port au Prince	September 6–7	*Shakespeare Park*	Saguenay Terminals
Netherlands—			
Amsterdam	July 31–Aug. 1	*Tabinta*	Furness Withy
Rotterdam			
Netherlands West Indies—			
Curaçao	July 28–29	*Apollo* (r)	Saguenay Terminals
Curaçao	August 7–8	*Benny* (r)	Saguenay Terminals
Uruguay—			
Montevideo	July 21–22	*Brazilian Prince*	Furness Withy
Montevideo	August 11–12	*Royal Prince*	Furness Withy
Venezuela—			
La Guaira	July 28–29	*Apollo* (r)	Saguenay Terminals
Puerto Cabello	September 6–7	*Shakespeare Park*	Saguenay Terminals
La Guaira	July 28–29	*Apollo* (r)	Saguenay Terminals
Maracaibo	August 7–8	*Benny* (r)	Saguenay Terminals

Remember the export market is a long way from home and the goods need something more than domestic packaging. Damaged goods mean wasted time in any trade transaction and possibly the loss of a customer. (*See our ABC of Canadian Export Trade, page 45.*)

Departures from Halifax

*Sails from Saint John about three days earlier.
(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Cuba—			
Santiago	August 8–10	*Dufferin Bell*	Pickford and Black
Newfoundland—			
St. John's	July 21–24	*Nova Scotia*	Furness Withy
St. John's	July 23–26	*Fort Townshend*	Furness Withy
St. John's	July 24–25	*Atlantic Charter*	Montreal Shipping
St. John's	July 26–28	*Mary Sweeney*	Newfoundland Canada
St. John's	August 3–6	*Newfoundland*	Furness Withy
St. John's	August 5–7	*Atlantic Charter*	Montreal Shipping
St. John's	August 17–19	*Atlantic Charter*	Montreal Shipping
St. John's	August 21–24	*Nova Scotia*	Furness Withy
St. Pierre et Miquelon	July 24–25	*Atlantic Charter*	Montreal Shipping
	August 5–7	*Atlantic Charter*	Montreal Shipping
	August 17–19	*Atlantic Charter*	Montreal Shipping
United Kingdom—			
Liverpool	July 21–27	*Nova Scotia*	Furness Withy
Liverpool	August 3–6	*Newfoundland*	Furness Withy
Liverpool	August 21–24	*Nova Scotia*	Furness Withy
Southampton	August 6	*Aquitania*	Cunard Donaldson
Southampton	August 27	*Aquitania*	Cunard Donaldson
Southampton	September 18	*Aquitania*	Cunard Donaldson
West Indies—	July 16–27	**Lady Rodney* (r)	Canadian National
Bermuda	July 23–26	*Fort Amherst*	Furness Withy
	July 29–Aug. 2	*Fort Townshend*	Furness Withy
	August 22–31	**Lady Nelson* (r)	Canadian National
	September 4–12	**Lady Rodney* (r)	Canadian National
Jamaica	August 8–10	*Dufferin Bell*	Pickford and Black
Antigua, Barbados, Grenada, St. Kitts, St. Lucia, St. Vincent, Trinidad	July 16–27	**Lady Rodney* (r)	Canadian National
	August 22–31	**Lady Nelson* (r)	Canadian National
	September 4–12	**Lady Rodney* (r)	Canadian National
Dominica, Montserrat	July 16–27	**Lady Rodney* (r)	Canadian National
	August 22–31	**Lady Nelson* (r)	Canadian National
	September 4–12	**Lady Rodney* (r)	Canadian National
British Guiana	July 16–27	**Lady Rodney* (r)	Canadian National
	August 22–31	**Lady Nelson* (r)	Canadian National
	September 4–12	**Lady Rodney* (r)	Canadian National

Departures from Saint John

Destination	Loading Date	Vessel	Operator or Agent
British Honduras—			
Belize	August 11–12	*Fort Panmure*	Saguenay Terminals
Canal Zone—			
Cristobal	August 11–12	*Fort Panmure*	Saguenay Terminals
Colombia—			
Barranquilla	September 12–13	*Shakespeare Park*	Saguenay Terminals
Dominican Republic—			
Ciudad Trujillo	August 11–12	*Fort Panmure*	Saguenay Terminals
Ciudad Trujillo	September 12–13	*Shakespeare Park*	Saguenay Terminals
Guatemala—			
Puerto Barrios	August 11–12	*Fort Panmure*	Saguenay Terminals

Departures from Saint John—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
Haiti—			
Port au Prince	August 11–12	*Fort Panmure*	Saguenay Terminals
Port au Prince	September 12–13	*Shakespeare Park*	Saguenay Terminals
United Kingdom—			
Liverpool, Manchester	July 26–30	*Stuart Prince*	Furness Withy
London	August 1–3	*Vandalia*	Cunard Donaldson
Venezuela—			
La Guaira, Puerto Cabello	September 12–13	*Shakespeare Park*	Saguenay Terminals

Departures from Vancouver

Ships listed under "Departures from Vancouver" may possibly be loading in addition at New Westminster. Exporters should communicate with agents in Vancouver to obtain information concerning loading dates, berths, available cargo space and rates.

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Africa East—			
Lourenço Marques	August 19	*Overijsel*	Dingwall Cotts
Beira	September 7	*Silversandal*	Dingwall Cotts
Africa-South—			
Cape Town, Port Elizabeth	August 19	*Overijsel*	Dingwall Cotts
East London, Durban	September 7	*Silversandal*	Dingwall Dotts
Argentina—			
Rosario	July 31	*Siranger*	Empire Shipping
Buenos Aires	August 25	*Hindanger*	Empire Shipping
Australia—			
Sydney	July 20	*Helmspey*	Canadian Australasian
Sydney, Melbourne, Adelaide	Early August	*Wangaratta*	Empire Shipping
Belgium—			
Antwerp	July 31	*Seattle* (r)	Gardner Johnson
Antwerp	August 3	*Paraguay* (r)	Gardner Johnson
Antwerp	August 13	*La Plata* (r)	Gardner Johnson
Antwerp	August 19	*Brest*	Empire Shipping
Antwerp	August 26	*Golden Gate* (r)	Gardner Johnson
Antwerp	September 26	*Argentina*	Gardner Johnson
Canal Zone—			
Balboa, Cristobal	July 27	*Anchor Hitch*	Gardner Johnson
	August 8	*Coastal Adventurer*	Gardner Johnson
	August 23	*Coastal Nomad*	Gardner Johnson
Balboa	July 31	*Santa Adela* (r)	Gardner Johnson
	August 22	*Santa Leonor* (r)	Gardner Johnson
	September 8	*Santa Juana* (r)	Gardner Johnson
Ceylon—			
Colombo	July 26	*Borneo*	Dingwall Cotts
Colombo	August 10	*Japara*	Dingwall Cotts
Colombo	August 16–17	*Washington Mail*	American Mail Line
Colombo	August 18	*Silverguava*	Dingwall Cotts
Chile—			
Valparaiso	July 31	*Siranger*	Empire Shipping
Valparaiso	August 25	*Hindanger*	Empire Shipping

Departures from Vancouver—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Chile—Con.			
Arica	July 31	*Santa Adela* (r)	Gardner Johnson
Antofagasta	August 22	*Santa Leonor* (r)	Gardner Johnson
Valparaiso	September 8	*Santa Juana* (r)	Gardner Johnson
China—			
Shanghai	July 20–21	*American Mail*	American Mail Line
Tsingtao	August 20–21	*India Mail*	American Mail Line
Taku Bar			
Shanghai	August 4–5	*Narrandera*	Empire Shipping
Taku Bar	August 27	*Vilja*	Empire Shipping
Shanghai	July 30–31	*Canada Mail*	American Mail Line
Shanghai	Late July	*Hemland*	Gardner Johnson
Shanghai	August 12–13	*Oregon Mail* (r)	Gardner Johnson
Shanghai	August 27–28	*China Mail*	American Mail Line
Colombia—			
Barranquilla	July 27	*Anchor Hitch*	Gardner Johnson
Barranquilla	August 8	*Coastal Adventurer*	Gardner Johnson
Barranquilla	August 15	*Don Anselmo* (r)	Empire Shipping
Barranquilla	August 23	*Coastal Nomad*	Gardner Johnson
Barranquilla	July 24	*Don Aurelio* (r)	Empire Shipping
Cartagena			
Buenaventura	July 31	*Santa Adela* (r)	Gardner Johnson
Buenaventura	August 22	*Santa Leonor* (r)	Gardner Johnson
Buenaventura	September 8	*Santa Juana* (r)	Gardner Johnson
Costa Rica—			
Puntarenas	July 24	*Don Aurelio* (r)	Empire Shipping
Ecuador—			
Guayaquil	July 31	*Santa Adela* (r)	Gardner Johnson
Guayaquil	August 22	*Santa Leonor* (r)	Gardner Johnson
Guayaquil	September 8	*Santa Juana* (r)	Gardner Johnson
El Salvador—			
La Union	July 24	*Don Aurelio* (r)	Empire Shipping
Fiji Islands			
Suva	August 7	*Thor I*	Empire Shipping
France—			
Le Havre	August 19	*Brest*	Empire Shipping
Greece—			
Piraeus	Mid-August	*A Ship*	Empire Shipping
Hong Kong	July 20–21	*American Mail*	American Mail Line
	July 30–31	*Canada Mail*	American Mail Line
	August 4–5	*Narrandera*	Empire Shipping
	August 14	*Francisville*	Balfour Guthrie
	August 20–21	*India Mail*	American Mail Line
	August 27	*Vilja*	Empire Shipping
	August 27–28	*China Mail*	American Mail Line
India and Pakistan—			
Bombay	August 10	*Japara*	Dingwall Cotts
Karachi	August 18	*Silverguava*	Dingwall Cotts
Bombay	July 26	*Borneo*	Dingwall Cotts
Madras			
Calcutta			
Madras	August 6–7	*Washington Mail*	American Mail Line
Calcutta	September 5	*Höegh Merchant*	Dingwall Cotts
Italy—			
Genoa	Mid-August	*A Ship*	Empire Shipping
Naples			

Departures from Vancouver—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Japan—			
Yokohama	July 20–21	*American Mail*	American Mail Line
Yokohama	July 30–31	*Canada Mail*	American Mail Line
Yokohama	August 12–13	*Oregon Mail* (r)	American Mail Line
Yokohama	August 13–19	*Lake Kootenay*	Anglo Canadian
Yokohama	August 19–25	*Lake Sumas*	Canada Shipping
Yokohama	August 19–25	*Lake Athabasca*	Anglo Canadian
Yokohama	August 19–25	*Lake Pennask*	Anglo Canadian
Yokohama	August 20–21	*India Mail*	American Mail Line
Malaya—			
Penang	August 6–7	*Washington Mail*	American Mail Line
Port Swettenham	August 14	*Francisville*	Balfour Guthrie
	August 18	*Silverguava*	Dingwall Cotts
Mexico—			
Manzanillo	July 27	*Anchor Hitch*	Gardner Johnson
Acapulco	August 8	*Coastal Adventurer*	Gardner Johnson
	August 23	*Coastal Nomad*	Gardner Johnson
Netherlands—			
Rotterdam	August 15	*Brest*	Empire Shipping
Netherlands East Indies—			
Batavia	July 26	*Borneo*	Dingwall Cotts
Soerabaya	August 6–7	*Washington Mail*	American Mail Line
	August 10	*Japara*	Dingwall Cotts
	August 14	*Francisville*	Balfour Guthrie
	September 5	*Hoegh Merchant*	Dingwall Cotts
New Caledonia—			
Noumea	August 7	*Thor I*	Empire Shipping
New Zealand—			
Auckland, Wellington	July 27	*Helmspey*	Canadian Australasian
Peru—			
Callao	July 31	*Siranger*	Empire Shipping
Callao	August 25	*Hindanger*	Empire Shipping
Callao	July 31	*Santa Adela* (r)	Gardner Johnson
Mollendo	August 22	*Santa Leonor* (r)	Gardner Johnson
	September 8	*Santa Juana* (r)	Gardner Johnson
Persian Gulf	August 10	*Japara*	Dingwall Cotts
Philippines—			
Manila	July 20–21	*American Mail*	American Mail Line
Iloilo	July 30–31	*Canada Mail*	American Mail Line
Cebu	August 6–7	*Washington Mail*	American Mail Line
	August 12–13	*Oregon Mail* (r)	American Mail Line
	August 14	*Francisville*	Balfour Guthrie
Manila	Late July	*Hemland*	Gardner Johnson
	August 4–5	*Narrandera*	Empire Shipping
	August 27	*Vilja*	Empire Shipping
Manila	July 26	*Borneo*	Dingwall Cotts
Cebu	August 10	*Japara*	Dingwall Cotts
	August 18	*Silverguava*	Dingwall Cotts
Manila, Iloilo	September 5	*Höegh Merchant*	Dingwall Cotts
Samoa—			
Apia	July 29	*Helmspey*	Canadian Australasian
Apia	August 7	*Thor I*	Empire Shipping
Singapore	August 6–7	*Washington Mail*	American Mail Line
	August 14	*Francisville*	Balfour Guthrie
Society Islands—			
Papeete	July 29	*Helmspey*	Canadian Australasian
Papeete	August 7	*Thor I*	Empire Shipping

Departures from Vancouver—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
Sweden—			
Stockholm	July 31	*Seattle* (r)	Gardner Johnson
	August 3	*Paraguay* (r)	Gardner Johnson
Gothenburg	August 13	*La Plata* (r)	Gardner Johnson
	August 26	*Golden Gate* (r)	Gardner Johnson
	September 26	*Argentina* (r)	Gardner Johnson
United Kingdom—			
Liverpool, Manchester	Early August	*Pacific Enterprise*	Furness Withy
London	July 31	*Seattle* (r)	Gardner Johnson
London	August 1–6	*Lake Cowichan*	Anglo Canadian
London	August 3	*Paraguay* (r)	Gardner Johnson
London	August	*Corrientes*	Balfour Guthrie
London	August 13	*La Plata* (r)	Gardner Johnson
London	Aug. 18–Sept. 1	*Lake Nipigon*	Empire Shipping
London	August 26	*Golden Gate* (r)	Gardner Johnson
London	September 26	*Argentina* (r)	Gardner Johnson
Uruguay—			
Montevideo	July 31	*Siranger*	Empire Shipping
Montevideo	August 25	*Hindanger*	Empire Shipping
Venezuela—			
Maracaibo	July 27	*Anchor Hitch*	Gardner Johnson
Maracaibo	August 8	*Coastal Adventurer*	Gardner Johnson
Maracaibo	August 23	*Coastal Nomad*	Gardner Johnson
Maracaibo, La Guaira, Puerto Cabello	July 24	*Don Aurelio* (r)	Empire Shipping
	August 15	*Don Anselmo* (r)	Empire Shipping

Foreign Trade Index

The Index to *Foreign Trade* for the Six Months ending December, 1947, is being distributed to all subscribers of this publication. Anyone who has not received their copy by July 31, 1948, should notify the Publicity Division, Department of Trade and Commerce, Ottawa.

An examination of the terms of an ocean bill of lading will reveal that there are numerous risks for which the transportation company does not accept responsibility. Consequently, banks will not accept drafts for discount unless, in addition to the bill of lading, it is accompanied by an insurance policy or certificate of insurance under an open policy which is frequently employed by regular shippers. Insurance policies or certificates should be made out to order of shippers and then endorsed by them so that in the event of loss of goods collection may be made by holder of policy. In making out a policy it is important to obtain adequate coverage and at the same time avoid the unnecessary cost of over-insurance. It is usually desirable to cover export shipment from the time it leaves exporter's factory to point of arrival in consignee's premises—or by warehouse-to-warehouse clause. A shipper should consult a reliable marine insurance broker when securing his marine insurance policy, and be explicit as to the needs of the importer. (*See our ABC of Canadian Export Trade, page 21.*)

Foreign Trade Service Abroad

Cable address:—*Canadian*, unless otherwise shown.

ote.—Bentley's Second Phrase Code is used by Canadian Trade Commisssioners.

Argentina

enos Aires—H. L. Brown. Commercial Secretary, Canadian Embassy, Bartolomé Mitre 478.
Territory includes Uruguay and Paraguay.

enos Aires—W. B. McCullough, Commercial Secretary (Agricultural Specialist), Canadian Embassy, Bartolomé Mitre 478.

Australia

dney—C. M. Croft. Commercial Counsellor for Canada, City Mutual Life Building, Hunter and Bligh Streets. Address for letters: Post Office Box 3952V.
Territory includes the Australian Capital Territory, New South Wales, Queensland, Northern Territory and Dependencies.

dney—Dr. W. C. Hopper, Commercial Secretary for Canada (Agricultural Specialist). City Mutual Building. Hunter and Bligh Streets. Address for letters: Post Office Box 3952V.

elbourne—F. W. Fraser, Commercial Secretary for Canada, 83 William Street.
Territory includes States of Victoria, South Australia, Western Australia, and Tasmania.

Belgian Congo

opoldville—L. H. Ausman, Canadian Government Trade Commissioner, Forescom Building. Address for letters: Boîte Postale 373.
Territory includes Angola and French Equatorial Africa.

Belgium

ussels—B. A. Macdonald, Commercial Secretary, Canadian Embassy, 46 rue Montoyer.

Brazil

o de Janeiro—Maurice Bélanger, Commercial Secretary, Canadian Embassy, Ed. Metropòle, Avenida Presidente Wilson 165. Address for letters: Caixa Postal 2164.

o Paulo—J. C. Depocas, Canadian Government Trade Commissioner, Canadian Consulate, Edificio Alois, Rua 7 de Abril 252. Address for letters: Caixa Postal 6034.

Chile

Santiago—E. H. Maguire, Acting Commercial Secretary, Canadian Embassy, Bank of London and South American Building. Address for letters: Casilla 771.
Territory includes Bolivia.

China

Shanghai—L. M. Cosgrave, Commercial Counsellor for Canada, 27 The Bund. Postal District (0).

Colombia

Bogotá—H. W. Richardson, Acting Canadian Government Trade Commissioner, Edificio Colombiana de Seguros. Address for letters: Apartado 1618. Address for air mail: Apartado Aereo 3562.
Territory includes Republic of Panama and the Canal Zone.

Cuba

Havana—R. G. C. Smith, Commercial Secretary, Canadian Legation, Avenida de las Misiones 17. Address for letters: Apartado 1945.
Territory includes Haiti, Dominican Republic and Puerto Rico.

Egypt

Cairo—J. M. Boyer, Canadian Government Trade Commissioner, 22 Sharia Kasr el Nil. Address for letters: Post Office Box 1770.
Territory includes the Sudan, Palestine, Cyprus, Iraq, Syria and Iran.

France

Paris—J. P. Manion, Commercial Secretary, Canadian Embassy, 3 rue Scribe.
Territory includes Algeria, French Morocco and Tunisia.

Paris—J. H. Tremblay, Commercial Secretary (Agricultural Specialist), Canadian Embassy, 3 rue Scribe.
Territory includes Belgium, Denmark, France and the Netherlands.

Germany

Frankfurt—B. J. Bachand, Canadian Economic Representative, % Allied Contact Section, H.Q. EUCOM, Frankfurt, A.P.O. 757, U.S. Army.
Cable address, Canadian Frankfurt/Main.

Foreign Trade Service Abroad—*Continued*

Greece

Athens—T. J. Monty, Commercial Secretary, Canadian Embassy, 31 Vassilissis Sophias Avenue.
Territory includes Turkey.

Guatemala

Guatemala City—C. B. Birkett, Canadian Government Trade Commissioner, Post Office Box 400.
Territory includes Costa Rica, El Salvador, Honduras and Nicaragua.

Hong Kong

Hong Kong—K. F. Noble, Canadian Government Trade Commissioner, Hong Kong Bank Building. Address for letters: Post Office Box 126.
Territory includes South China, the Philippine Islands and French Indo-China.

India

New Delhi—Richard Grew, Commercial Secretary, Office of the High Commissioner for Canada, Post Office Box 114.

Bombay—C. R. Gallow, Commercial Secretary for Canada, Gresham Assurance House, Mint Road. Address for letters: Post Office Box 886.
Territory includes Burma and Ceylon.

Ireland

Dublin—H. L. E. Priestman, Commercial Secretary for Canada, 66 Upper O'Connell Street.

Belfast—H. L. E. Priestman, Canadian Government Trade Commissioner, 36 Victoria Square.

Italy

Rome—A. P. Bissonnet, Acting Commercial Secretary, Canadian Embassy. Via Saverio Mercadante 15-17.
Territory includes Malta, Yugoslavia and Libya.

Jamaica

Kingston—R. V. N. Gordon, Acting Canadian Government Trade Commissioner, Canadian Bank of Commerce Chambers. Address for letters: Post Office Box 225.
Territory includes the Bahamas and British Honduras.

Mexico

Mexico City—D. S. Cole, Commercial Counsellor, Canadian Embassy, Edificio Internacional, Paseo de la Reforma. Address for letters: Apartado Num. 126-Bis.

Netherlands

The Hague—J. A. Langley, Commercial Counsellor, Canadian Embassy, Sophialaan 1-A.

Newfoundland

St. John's—R. Campbell Smith, Commercial Secretary, Office of the High Commissioner for Canada, Circular Road.

New Zealand

Wellington—P. V. McLane, Commercial Secretary, Office of the High Commissioner for Canada, Post Office Box 1660.
Territory includes Fiji and Western Samoa.

Norway

Oslo—S. G. MacDonald, Commercial Secretary, Canadian Legation, Fridtjof Nansens Plass 5.
Territory includes Denmark and Greenland.

Pakistan

Karachi—G. A. Browne, Acting Canadian Government Trade Commissioner, The Cotton Exchange, McLeod Road. Address for letters: Post Office Box 531.
Territory includes Afghanistan.

Peru

Lima—C. J. Van Tighem, Commercial Secretary, Canadian Embassy. Edificio Boza, Carabaya 831, Plaza San Martin. Address for letters: Casilla 1212.
Territory includes Ecuador.

Portugal

Lisbon—L. S. Glass, Canadian Government Trade Commissioner, Canadian Consulate General, Rua Rodrigo da Fonseca 103.
Territory includes the Azores and Madeira, Spain, Spanish Morocco, the Canary Islands and Gibraltar.

Singapore

Singapore—Paul Sykes, Canadian Government Trade Commissioner, Room D-2, Union Building. Address for letters: Post Office Box 845.
Territory includes Federation of Malaya, North Borneo, Brunei, Sarawak, Siam and Netherlands East Indies.

Foreign Trade Service Abroad—*Concluded*

South Africa

Johannesburg—S. V. Allen, Commercial Secretary for Canada, Mutual Buildings, Harrison Street. Address for letters: Post Office Box 715.
Territory includes Transvaal, Natal, Southern Rhodesia, Northern Rhodesia, Mozambique or Portuguese East Africa, Kenya, Nyasaland, Tanganyika and Uganda.
Cable address, Cantracom.

Cape Town—S. G. Tregaskes, Acting Commercial Secretary for Canada, New South African Mutual Buildings, 21 Parliament Street. Address for letters: Post Office Box 683.
Territory includes Cape Province, Orange Free State, South-West Africa, Mauritius and Madagascar.
Cable address, Cantracom.

Sweden

Stockholm—F. H. Palmer, Commercial Counsellor, Canadian Legation, Strandvägen 7-C. Address for letters: Post Office Box 14042.
Territory includes Finland.

Switzerland

Berne — Yves Lamontagne, Commercial Counsellor, Canadian Legation, Thunstrasse 95.
Territory includes Austria, Czechoslovakia and Hungary.

Trinidad

Port-of-Spain—A. W. Evans, Acting Canadian Government Trade Commissioner, Colonial Life Insurance Building. Address for letters: Post Office Box 125.
Territory includes Barbados, Windward and Leeward Islands, British Guiana, Dutch Guiana, French Guiana, and the French West Indies.

United Kingdom

London—A. E. Bryan, Commercial Counsellor, Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Cable address, Sleighing, London.

London—R. P. Bower, Commercial Secretary, Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Territory includes the South of England, East Anglia and British West Africa (Gold Coast, Sierra Leone and Nigeria).
Cable address, Sleighing, London.

London—W. B. Gornall, Commercial Secretary (Agricultural Specialist), Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Cable address, Cantracom, London.

London—R. D. Roe, Commercial Secretary (Timber Specialist), Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Cable address, Timcom, London.

Liverpool—M. J. Vechsler, Canadian Government Trade Commissioner, Martins Bank Building, Water Street.
Territory includes the Midlands, North of England and Wales.

Glasgow—G. F. G. Hughes, Acting Canadian Government Trade Commissioner 200 St. Vincent Street.
Territory covers Scotland and Iceland.
Cable address, Cantracom.

United States

Washington—J. H. English, Commercial Counsellor, Canadian Embassy, 1746 Massachusetts Avenue, N.W.

Washington—G. R. Paterson, Agricultural Counsellor, Canadian Embassy, 1746 Massachusetts Avenue, N.W.

New York City—M. T. Stewart, Canadian Government Trade Commissioner, British Empire Building, Rockefeller Centre.
Territory includes Bermuda.
Cable address, Cantracom.

Chicago—Edmond Turcotte, Consul-General for Canada, Suite 800, Chicago Daily News Building, 400 West Madison Street.

Los Angeles—V. E. Duclos, Canadian Government Trade Commissioner, Associated Realty Building. 510 West Sixth Street.

Venezuela

Caracas—C. S. Bissett, Canadian Government Trade Commissioner. Address for letters: Canadian Consulate General, 8° Piso, Edificio America, Esq. Veroes.
Territory includes Netherlands West Indies.

Foreign Exchange Quotations

The following are nominal quotations, based on rates available in London or New York and converted into Canadian terms at the mid-rate for sterling or par for United States dollars, as furnished by the Foreign Exchange Division of the Bank of Canada. These quotations may be found useful in considering statistics and prices generally, but Canadian exporters are reminded that the kinds of currency which may be accepted for exports to different countries are specifically covered by the Foreign Exchange Control Act and Regulations, and that funds may sometimes be tendered in payment for exports, which cannot, in fact, be transferred to Canada. Both importers and exporters are advised to communicate with their bankers before completing financial arrangements for the sale or purchase of commodities, to ensure that the method of payment contemplated is not only possible but that it is in accordance with the Foreign Exchange Control Act and Regulations.

Country	Monetary Unit		Nominal Quotations July 5	Nominal Quotations July 12
Argentina	Peso	Off.	·2977	·2977
		Free	·2085	·2070
Australia	Pound	....	3·2240	3·2240
Belgium and Belgian Congo	Franc	....	·0228	·0228
Bolivia	Boliviano	....	·0238	·0238
British West Indies (except Jamaica)	Dollar	....	·8396	·8396
Brazil	Cruzeiro	....	·0544	·0544
Chile	Peso	Off.	·0517	·0517
		Export	·0322	·0322
Colombia	Peso	....	·5714	·5714
Cuba	Peso	....	1·0000	1·0000
Czechoslovakia	Koruna	....	·0200	·0200
Denmark	Krone	....	·2083	·2083
Ecuador	Sucre	....	·0740	·0740
Egypt	Pound	....	4·1330	4·1330
Eire	Pound	....	4·0300	4·0300
Fiji	Pound	....	3·6306	3·6306
Finland	Markka	....	·0073	·0073
France and French North Africa	Franc	Off.	·0046	·0046
		Free	.0032	·0032
French Empire—African	Franc	....	·0079	·0079
French Pacific Possessions	Franc	....	·0201	·0201
Haiti	Gourde	....	·2000	·2000
Hong Kong	Dollar	....	·2518	·2518
Iceland	Krona	....	·1541	·1541
India	Rupee	....	·3022	·3022
Iraq	Dinar	....	4·0300	4·0300
Italy	Lira	....	·0017	·0017
Jamaica	Pound	....	4·0300	4·0300
Ma'aya	Dollar	....	·4701	·4701
Mexico	Peso	....	·2059	·2059
Netherlands	Florin	....	·3769	·3769
Netherlands East Indies	Florin	....	·3769	·3769
Netherlands West Indies	Florin	....	·5302	·5302
New Zealand	Pound	....	3·2402	3·2402
Norway	Krone	....	·2015	·2015
Pakistan	Rupee	....	·3022	·3022
Palestine	Pound	....	4·0300	4·0300
Peru	Sol	....	·1538	·1538
Philippines	Peso	....	·5000	·5000
Portugal	Escudo	....	·0403	·0403
Siam	Baht	....	·1000	·1000
Spain	Peseta	....	·0916	·0916
Sweden	Krona	....	·2783	·2783
Switzerland	Franc	....	·2336	·2336
Turkey	Pound	....	·3571	·3571
Union of South Africa	Pound	....	4·0300	4·0300
United Kingdom	Pound	....	4·0300	4·0300
United States	Dollar	....	1·0000	1·0000
Uruguay	Peso	Controlled	·6583	·6583
		Uncontrolled	·5629	·5618
Venezuela	Bolivar	....	·2985	·2985